

University Enrollment and Growth Strategies

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Wilsonville, K Falls, Extension and Online

Board of Trustees, June 30, 2016



Summary observations

- Oregon Tech is responding to national and state trends, and is well positioned for value in the markets we serve.
- Oregon Tech is deepening its strategic planning practices at the campus and program levels.
- Enrollment initiatives have been untethered from these emerging program and campus strategies. Alignment will increase effectiveness.
- Different tuition approaches may be necessary to address significant faculty overloads which may be capping growth and to improve adjunct compensation in the Portland area while remaining financially viable.
- Strategic enrollment management leadership is long overdue.



What are the trends affecting enrollment?

- Changes in the **university business model**.
 - As revenue sources shift; institutions employ new strategies to remain viable.
- **Demand for value**. Transparency of outcomes.
 - Career readiness, relevance, reasonable cost, availability, accessibility, flexibility.
- Emergence of **episodic and life-long learning**.
 - No longer a “one and done” model.
- Oregon’s **changing demographics**.
 - Increasing Latino population, stagnation of other underserved groups in college going rate and achievement; aspirations for higher high school graduation rate; a “lost generation” of high school and college drop outs.



Oregon Tech responds: enrollment strategies

- **Provide robust portfolio** of student options and access.
 - Online, blended, multi-campus, extension sites increase reach to students.
 - Partner with education “value chain” to pull in students.
 - Engaging business more directly—in initiatives such as OMIC, OREC, PHM Research Center, and the Cybersecurity Center.
- **Deliver affordable career value.**
 - High demand, high wage occupations relevant to Oregon.
 - “Just in time” and “where I am” educational opportunities.
- **Offer education in a variety of “completion” models;** and improve completion rates.
 - Degree, certificate, badging, continuing education.
 - Support models for retention (TOP/TRIO, texting project...)
- **Build to Oregon’s emerging demographics:** Latino, Native American, Black, rural.



Medical Lab Science

Renewable Energy Engineering

Sonography

Civil Engineering

Paramedic

Information Technology



Population Health Management

KF

WVL

Online

Seattle



Ch-keta
CC

Modalities

Programs drive enrollment.

- Operate across campuses
- Use a variety of modalities

Campuses provide access.

- Customize to student type
- Support services
- Facilities esp. labs
- Connection/support for faculty

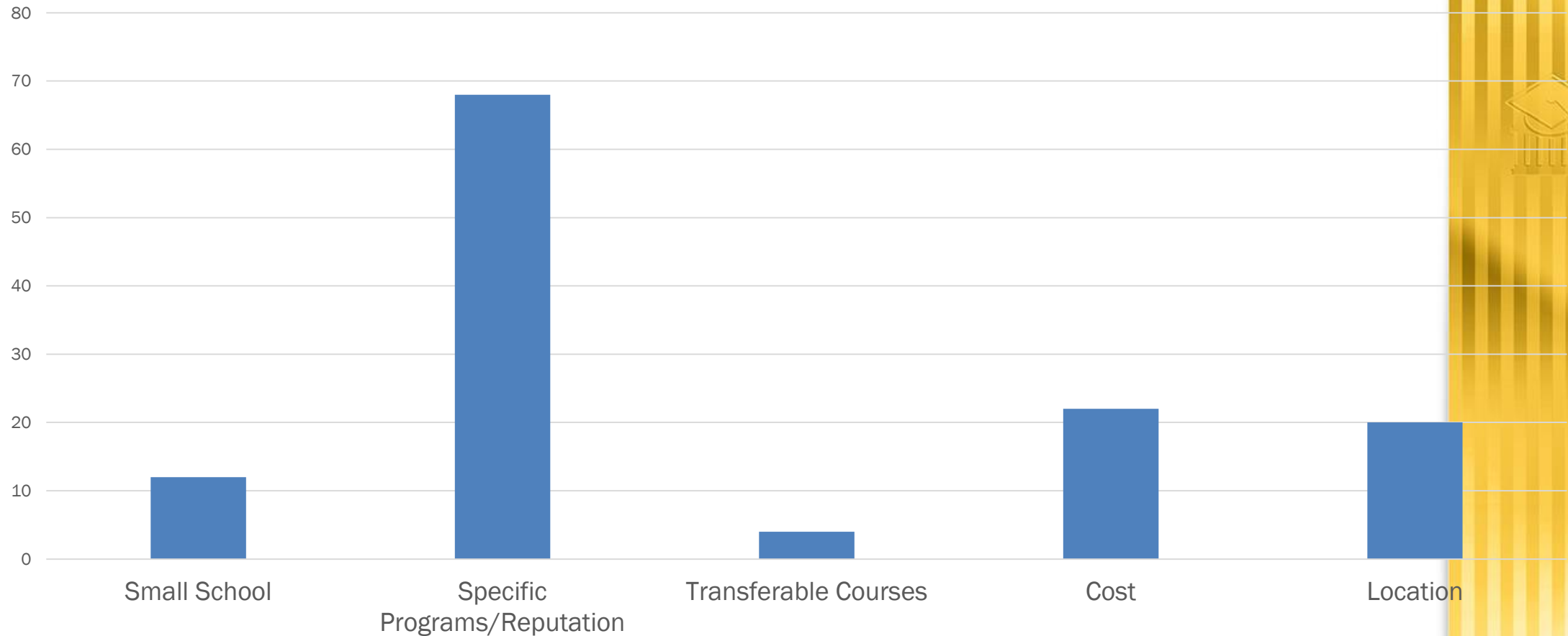
Modalities enable delivery.

- Online...blended...on-site

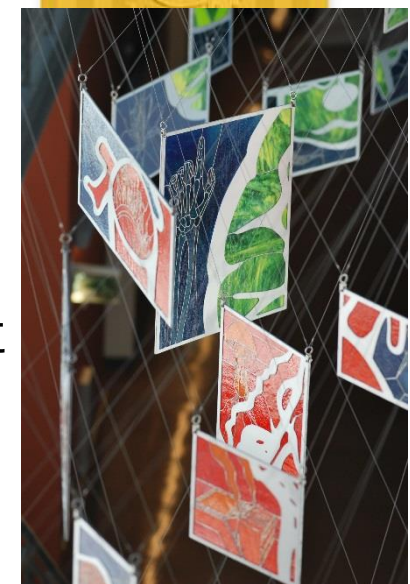


*Programs bring students to us...

Why did you end up choosing to attend Oregon Tech?



**From a 2015 student survey with 255 respondents*



At the deeper level...

aligning enrollment initiatives with strategy

- Program strategies are being developed comprehensively for the first time in decades.
 - Market-driven approach to planning.
 - Program margins: expenditures tied to enrollment growth.
- Online and Wilsonville have developed campus strategies. Seattle and K Falls will follow suit.

Recruiting has been untethered from these strategies, both program and campus, at this point.

Key actions:

- Complete strategies and organize to support program implementation.
- Hire strategic enrollment VP (Sept 2016).
- Connect recruiting strategies and tactics to program and campus directions.

University-wide growth: enablers and opportunities

- **Capitalize on high school pipeline.**
 - Convert higher percentage of HST/ACP students to Oregon Tech undergraduates.
 - Engage with STEM Hubs to connect with high school teachers and students.
 - Build on increasing high school graduates' population.
- **Explore tuition approaches.**
 - We are lower than other in-state options (\$13,400 in CA; \$10,900 in WA; \$14,000 in CO).
 - Differential tuition for expensive programs or access
- **Partnerships with community colleges.**
 - WA is doing interesting work with co-location.
- **Leverage new industry relationships** in OREC/OMIC and others.



University-wide growth: barriers and challenges

- Despite national accolades, Oregon Tech still struggles with **brand recognition**, even in-state.
- **Staying differentiated** in our key mission area—delivering hands-on education—**when delivering in novel modalities**.
- **Faculty capacity and recruiting.**
 - University-wide workload concerns.
 - Online depends on overload and out of load.
 - Wilsonville needs competitive adjunct compensation.
 - Klamath Falls doesn't have a robust adjunct pool.



Medical Lab Science

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Campus strategies.

- 1) What is the overall growth strategy in the campus target market?
- 2) What actual growth can we expect?
- 3) What do we need to succeed?

Modalities





ENROLLMENT AND GROWTH STRATEGIES

ONLINE EXPANSION

ERIKA VETH

Summary observations

- Oregon Tech Online marketing has successfully generated growth in online programs.
- The online portfolio includes offerings in degree completion, fully online programs (credentialed/licensed professionals), and online course offerings available to all students.
- Many online programs are at capacity.
- Growth is dependent on increasing faculty capacity and university commitment to online education.
- Integrate university-wide quality practices into online delivery.



Next steps

- Continue to build relationships with the rest of Oregon Tech:
 - All programs and all students, regardless of campus, belong to the department as a whole and should be collaboratively/holistically cultivated
 - Online growth can benefit entire operation—not a separate entity
- Revisit online compensation model without drastically affecting faculty income and while improving the welfare of others
 - Allow more in-load opportunities for full-time faculty
- Hire different types of faculty
 - Build an adjunct pool
 - Hire NTTF in areas where they are most needed—lower level Gen. Ed. & coverage for clusters of needed courses
- Accessibility is key—offer more sections
- Continue to invest in quality

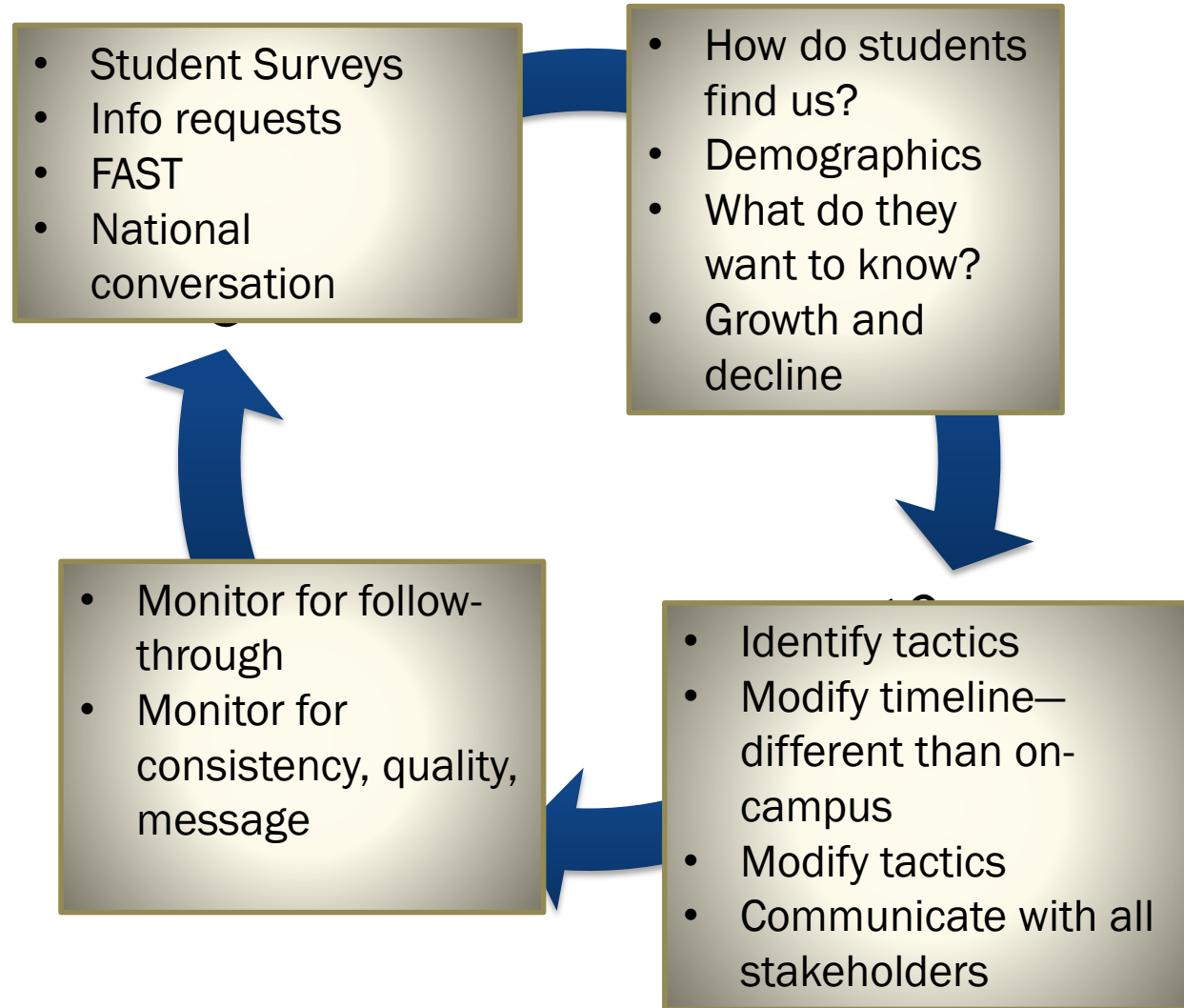


Overall growth strategy

- Strategic marketing and recruitment cycle
- Targeting prospective students
- Recruiting fully online students from populations other than KF/WLV prospects
- Support on-campus programs with online courses
- Investing in QUALITY—student and faculty support
- Building our faculty reserves



Marketing & recruitment cycle



Targeted recruitment tactics

- Niche market—STEM&M ONLINE
- Use of mailing lists from registries
- Focus on outside of Oregon
- Social media—Facebook
- Online college search engines
- Video/web design--80% first encounter us via the website
- Targeted web advertising
- Free marketing



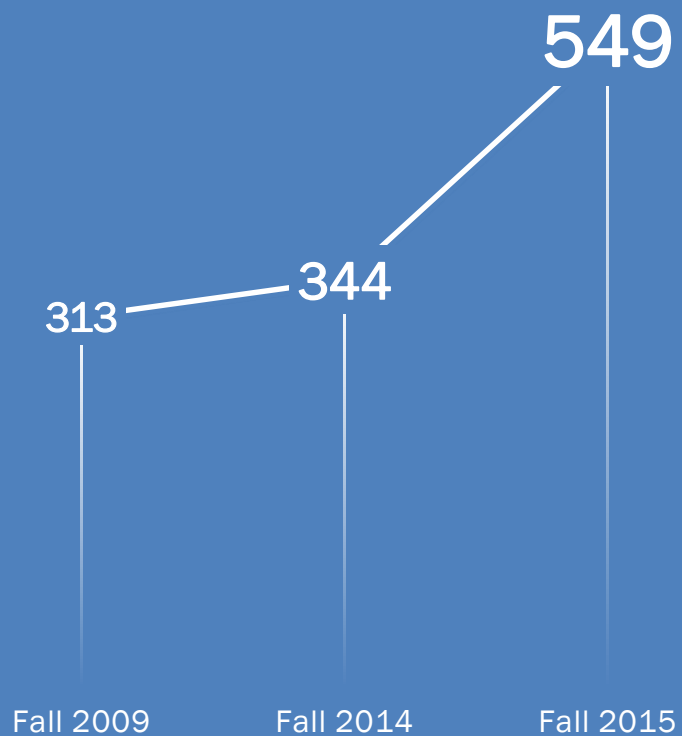
Messaging & branding

- What do online students want to know?
 - How long will it take to earn my degree?
 - Will my classes transfer?
 - How much will this cost?
 - Will I get a job when I graduate?
 - Will I make money?
 - How will this affect my family?
- Consistency in our brand
- All student support staff and advertising reflect answers to these questions

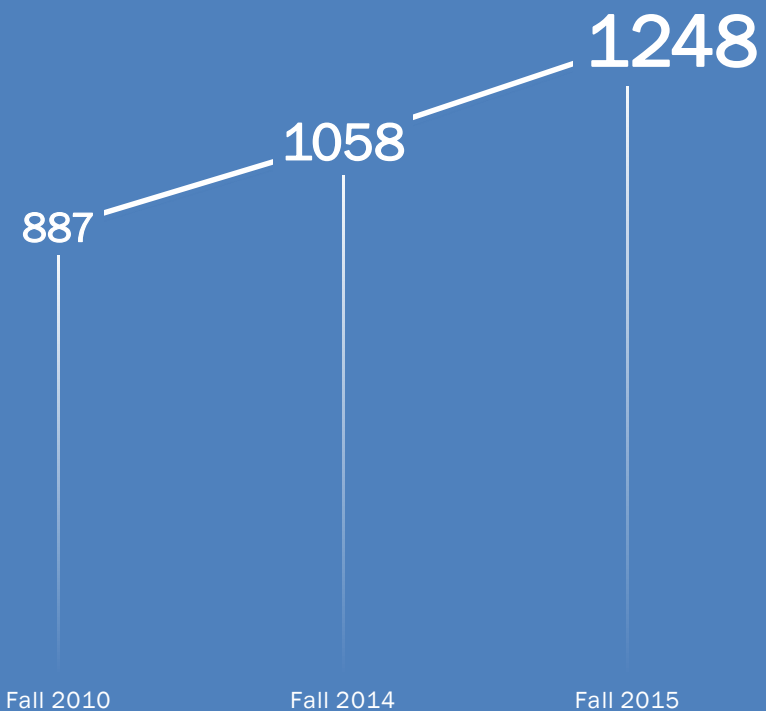


Recent growth

ONLINE PROGRAM ENROLLMENT



OREGON TECH STUDENTS ENROLLED IN ONLINE COURSES (UNDUPLICATED)



Expected growth

New opportunities for online campus recruitment

- Master of Science in Allied Health
- Geomatics—Online Surveying and GIS options
- Cyber Security-B.S.
- Picture Archiving & Communication System (PACS) Specialization
- Digital badging
- Non-Admit recruitment

Opportunities to support overall growth at Oregon Tech

- Population Health Management
- Clinical Lab Science
- Renewable & Electrical Engineering—M.S. & B.S. blended/online
- Increased offerings in general
- Remote technologies—Kubi robots, Zoom, accessible communication/collaboration tools



Investing in quality

- Participation in IDEA end-of-course evaluations
- Opens the conversation for inclusion of online courses in Annual Performance Evaluations (APE)
- Consistent reviews for content and pedagogy via a stream of instructional design staff and faculty content experts
- Technology should not get in the way of teaching & learning
 - Invest in online faculty support
 - Invest in student support staff



Sustainability of growth?

- Online infrastructure was designed in 1997 as an incentive model
- We have ample opportunity for growth, but current system needs revision apart from incentive model:
 - Online compensation model (per student/per credit)
 - Workload—79% carried by FT faculty in excess of regular workload
 - Not enough available sections—courses fill immediately
 - Needed courses are difficult to staff
 - Lack of an adjunct pool





ENROLLMENT AND GROWTH STRATEGIES

WILSONVILLE PERSPECTIVE

LAURA MCKINNEY

Summary observations

- Wilsonville has a variety of non-traditional students:
 - Requires tailored and nuanced recruiting strategies.
 - Time and course availability are the highest barriers.
- Programs are all high demand/high wage.
 - All stages of maturity: start-up, growing, established, capped.
- Industry opportunities such as OMIC and the Cybersecurity Center.
 - Needs faculty capacity/institutional incentives to capitalize.
- Competitive higher education environment in the Portland area; partnerships are key for student pipelines.



What do we need to succeed?

- Better understanding and strategic action in our recruiting efforts.
 - CRM data not reliable yet.
 - Ability to predict and track within the funnel is absent.
 - More investment in Portland metro recruiting.
- Retention initiatives focused on the areas identified by students as barriers:
 - Time, time, and time.
 - Course availability.
 - Money.
- Faculty workload reductions, especially in smaller departments.
- Competitive adjunct pay to ensure quality and build capacity with viable business model.
- Brand recognition.
- Having the “cool stuff” in our labs.



Campus strategy: Wilsonville

1) What is the overall growth strategy in the campus target market?

- *Know your students and what they value.*
- *Deliver.*

2) What actual growth can we expect?

- *Demand is high.*
- *Excellent execution is vital. Competitors are active.*

3) What do we need to succeed?

- *Alignment of resources to support program enrollment and strategy.*
- *Capacity and quality.*
- *Relevant student support.*



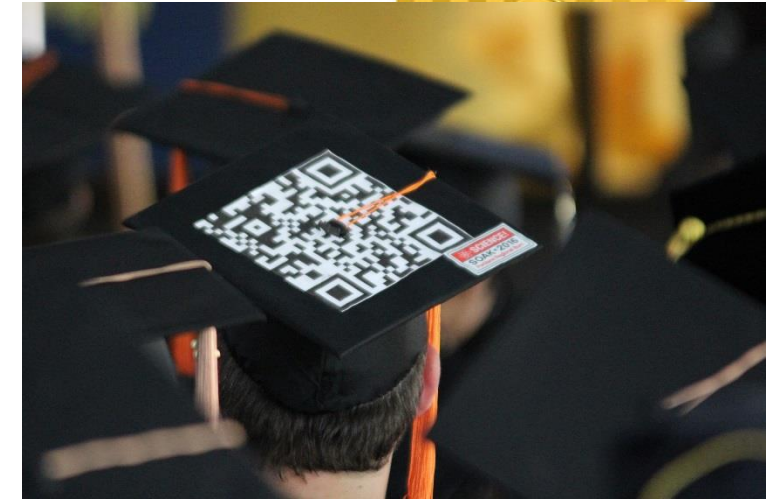
Who are our students?

- **Cost constrained, value conscious** students in the Portland-Salem area;
- **Career advancement** students who are employed and seeking development, promotion or a new position;
- **Differentiated degree** students who are attracted by the reputation of a distinguished program at Oregon Tech;
- **Time-sensitive; cost elastic** students who will pay more for an accelerated program;
- **International** students who are seeking a US university experience as part of their degree program;
- **Placebound** students in the Portland-Salem area interested in polytechnic education.



What makes a student decide to attend?

- Knowing we exist.
- Easy to apply.
- Compelling programs. Degrees have real market value.
- Confidence in our reputation.
- Direct interaction with faculty.
- Exposure to our labs.
- Transferability — able to complete in reasonable time.
- Financially within reach.
- Logistically feasible.



Are we effective?



What we do...
Build awareness
Build interest
Confirm value Address barriers
Ensure success
Maintain interest
Address barriers
Get them registered
Get them to campus



What we are doing or planning to do...

- Awareness. Excellent e-presence. STEM Hub participation.
- Deep connections with community colleges to reach transfer students.
- Partnering with other schools...(community colleges; private liberal arts)
- Program information and reputation; especially on website.
- Reputation growth through industry initiatives.
- Faculty contact through preview and registration days.
- Events at and website presence for labs.
- Quick transfer evaluation. Easy admission cycle.
- Financial counseling.
- Hub and spoke model to bring Oregon Tech to the community.



Programs offered at Wilsonville: high market demand

- Medical lab science (BS)
- Paramedic and emergency medical services management (AAS, BS)
- Applied psychology; applied behavioral analysis (BS)
- Electrical engineering; electronics engineering technology (BS) Optics.
- Renewable energy engineering (BS & MS)
- Operations management (BS)
- Applied technology and management (BAS)
- Information technology and cybersecurity (BS)
- Health informatics (BS)
- Software engineering technology (BS)
- Embedded systems engineering technology (BS)
- Manufacturing engineering technology (BS)
- Mechanical engineering; mechanical engineering technology (BS)



What are the barriers to completion? Time, time, time...

- Course schedule offerings @ 49%
- Personal life @ 44%
- Family life @ 40%
- The next highest was commuting to campus @ 24%
- Housing, advising and transfer issues all came in about 18%
- Food security is 11%



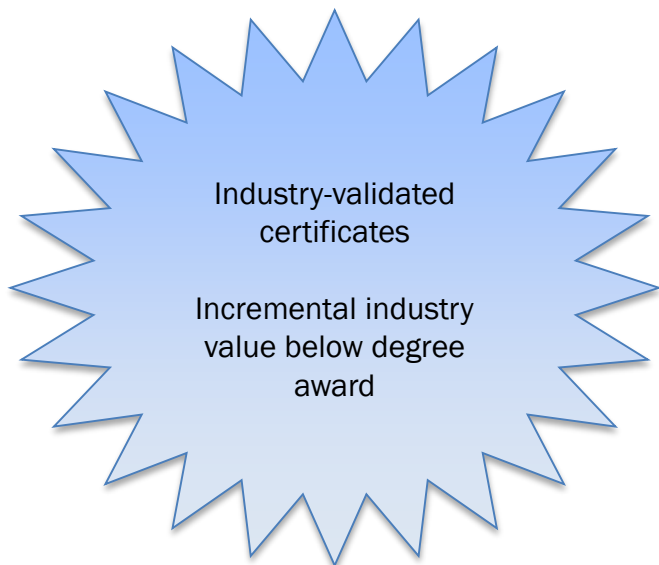
Are we helping them stay and complete?

Remember “time, time, time”...

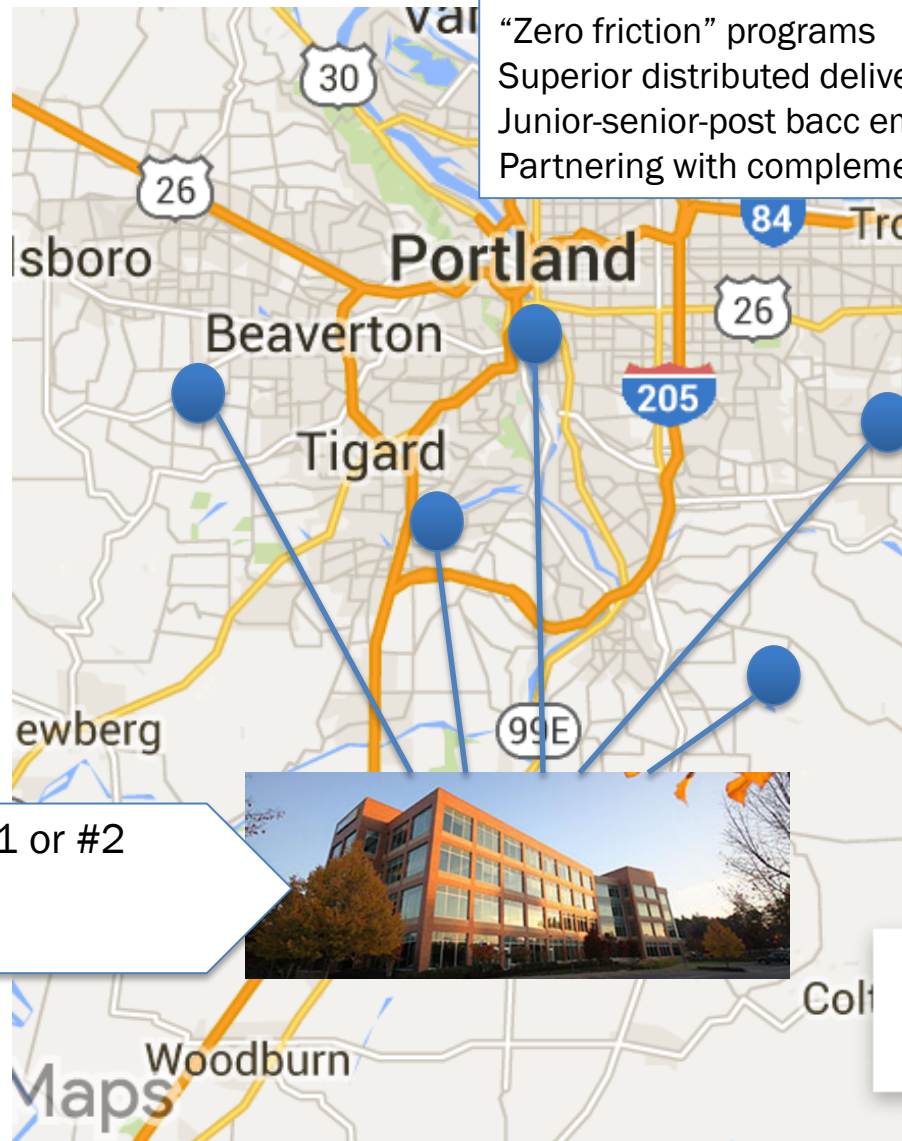
- Offering remote delivery courses to enable students to access Klamath Falls sections or to attend classes at partner sites in Portland and reduce commute time.
- Increasing online and blended options.
- Continuing nights/weekends emphasis.
- Peer consulting center available until 10p at night. Pilot of late night opening.
- Texting project includes Wilsonville students.
- Lack retention support; The Rock initiative only at K Falls.
- Increasing certificates to enable incremental value.
- Business service centers should help connect students to better employment opportunities while still in school.



Stepping back to strategy...



Broad technical focus
“Zero friction” programs
Superior distributed delivery
Junior-senior-post bacc emphasis
Partnering with complementors



Differentiated destination programs: #1 or #2
State-of-the-practice shared labs
Business service centers

Who are the competitors?

- Competitors vary by program strength and discipline. Some are natural partners as well.
- Competitors tend to reach just subsets of Oregon Tech’s market, with the exception of PSU.
- Includes:
 - Portland metro area community colleges.
 - Online offerings.
 - Portland metro area private technical universities (U of P).
 - Portland State University.
 - Oregon State University.
 - Specialty schools (e.g. code schools, ITT Tech, professional organizations such as SANS, PMI)
- One notable competitor is not going to school at all...building skills at work.

THE LIST

OREGON & S.W. WASHINGTON COLLEGES & UNIVERSITIES

RANKED BY TOTAL ENROLLMENT, FALL 2014

Compiled by Brandon Sawyer
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bsawyer@bizjournals.com

Rank	Name / prior rank / URL	Address / phone	Total enrollment, Fall 2014	Graduate enrollment	Faculty	Notable programs	Academic undergraduate tuition	Top local executive
1	Oregon State University	104 Sun Center Way, Corvallis, OR 97331, 503-737-3800	34,800	4,983	1,446	Agricultural sciences, business, Earth, space and atmospheric sciences, engineering, environmental sciences, engineering, environmental sciences, engineering, environmental sciences, engineering, environmental sciences	\$7,610	Edward Pitt
2	Portland State University	1025 N. W. 4th Ave., Portland, OR 97209, 503-526-2111	28,341	1,628	1,313	Business administration, health studies, computer science and digital communication science	\$6,520	Mark Kinast
3	University of Oregon	1128 University of Oregon, Eugene, OR 97403, 541-346-3980	24,181	1,811	2,036	Creative writing, grant-writing, history, college, team-building, education	\$6,180	Michael Scott
4	Concordia University	3311 S. Madison St., Portland, OR 97214, 503-298-2001	7,420	6,178	887	Education, business, health care, journalism, security, nursing	\$20,300	Charles Schlangert
5	Southern Oregon University	1700 Dakota Blvd., Astoria, OR 97103, 503-325-7922	6,760	601	222	Fine arts, nursing, business administration, economics, music, theater arts	\$1,120	Ray Seale
6	Western Oregon University	141 N. Monmouth Ave., Monmouth, OR 97136, 503-838-8000	6,018	227	84	Health and exercise sciences, police and teacher education, behavioral sciences, computer science, creative arts	NA	Mark Wells
7	Oregon Institute of Technology	1201 Canyon Dr., Klamath Falls, OR 97603, 541-883-1000	4,272	16	330	Medical imaging technology, software engineering, mechanical engineering, renewable energy engineering, nursing	\$8,575	Christopher Martin
8	University of Portland	500 N. Baltimore Blvd., Portland, OR 97207, 503-863-8000	4,123	469	339	Nursing, theology, mechanics of engineering, psychology, computer science	\$38,100	Ray Mark Pearson, C.S.C.
9	George Fox University	414 N. Mulford St., Newberg, OR 97132, 503-538-8383	3,791	1,276	232	Engineering, nursing, business, pre-medical, physical therapy	\$50,770	Rubin Baker
10	Eastern Oregon University	1 University Boulevard, La Grande, OR 97607, 509-451-8818	1,613	211	138	Agricultural science, business, education, dental hygiene, art and letters, technology	\$6,120	Jay Feltus
11	Pacific University	2041 College Way, Forest Grove, OR 97126, 503-352-4111	1,607	84	404	Liberal arts, sciences, business, education, health professions, sustainability	\$37,024	Lesley Hallett
12	Lewis & Clark College	6011 S.W. Helmer Hill Rd., Leavenworth, OR 97129, 503-766-7000	1,368	1,325	442	Entrepreneurship, international affairs, business and environmental law, teaching and counseling	\$41,622	Berry Gilman
13	Washington State University Vancouver	1420 N.E. Columbia Creek Rd., Vancouver, WA 98660	1,264	NA	100	Creative media and digital culture, engineering, environmental sciences, international studies, other	\$11,484	Zinda "Mae" Neumann

144K
Combined Fall 2014 graduates at the colleges and universities on The List.

\$22.2K
Average annual tuition for resident undergraduates at the colleges and universities on The List.

Oregon TECH

10.9K
Combined number of faculty at the colleges and universities on The List.

ABOUT THE LIST
Information was obtained from college representatives through questionnaires and may not be independently verified for the purposes of this list.

What growth can we expect?

- Capped, competitive and stable:
 - Medical lab science; paramedic.
- Destination programs and growing:
 - Electrical and renewable energy (BS and MS)
- Small faculty cohort but promising:
 - CSET is unique, but has just now grown to 3 local faculty in Fall 2017.
 - Information technology, informatics and cybersecurity are all realizing significant market interest. Small group of faculty under intense growth pressure.
 - Applied psychology, operations management and emergency medical services management are in early start-up phases.
- Fresh start:
 - Mechanical and manufacturing programs are in early redevelopment mode. Growth will take some time. OMIC is tremendous opportunity.
 - MS Engineering and multi-discipline BS degrees?
- Technology management program has untapped potential.





ENROLLMENT AND GROWTH STRATEGIES

KLAMATH FALLS

LEANN MAUPIN

Summary observations

- Klamath Falls strategy has been conflated with institution strategy.
- It is time to manage the institutional portfolio.
- Lack good data to make and evaluate meaningful strategic decisions.
 - Lack of dedicated institutional research.
 - CRM is underutilized.
- Program strategies are being developed comprehensively for the first time in decades.





Diagnosing the potential enrollment decline: more questions than answers

Maturing our enrollment practices will help answer questions:

- **Regular outreach:** What are the persistent reasons that Klamath Falls students leave or fail to enroll once admitted?
- **Focused recruiting:** How can we tailor our recruiting to reach target populations? How do we connect with program interest?
- **Better data in our funnel.** What are the most effective ways to find potential students and get them excited about Oregon Tech?
- **Oregon demographics:** How can we reach emerging **Latino** market?

Look at what's working for Oregon Tech Online and what's working with program-specific marketing initiatives...

Recruiting strategy by target student type

- Recruiting/admissions has been driven by an institutional strategy.
 - Identified targets by student location (e.g. out-of-state) or student level (e.g. Freshmen) rather than by program interest.
 - No practice of setting specific targets by population to achieve student mix.
 - Somewhat of a “one-size-fits-all” approach.
 - Institutional strategy has not been stable enough over time to see strategic outcomes emerge.
 - Other campuses, and some programs, have been engaged in individual recruiting tailored to their populations. This is showing success.
- Focus on Klamath Falls campus has been less intentional than outlying campuses and online.
 - Klamath Falls strategy conflated with institution strategy.
 - Nuances of the differences in student markets by campus are not currently built into recruiting tactics.
 - Klamath Falls strategy will focus recruiting/admissions efforts.



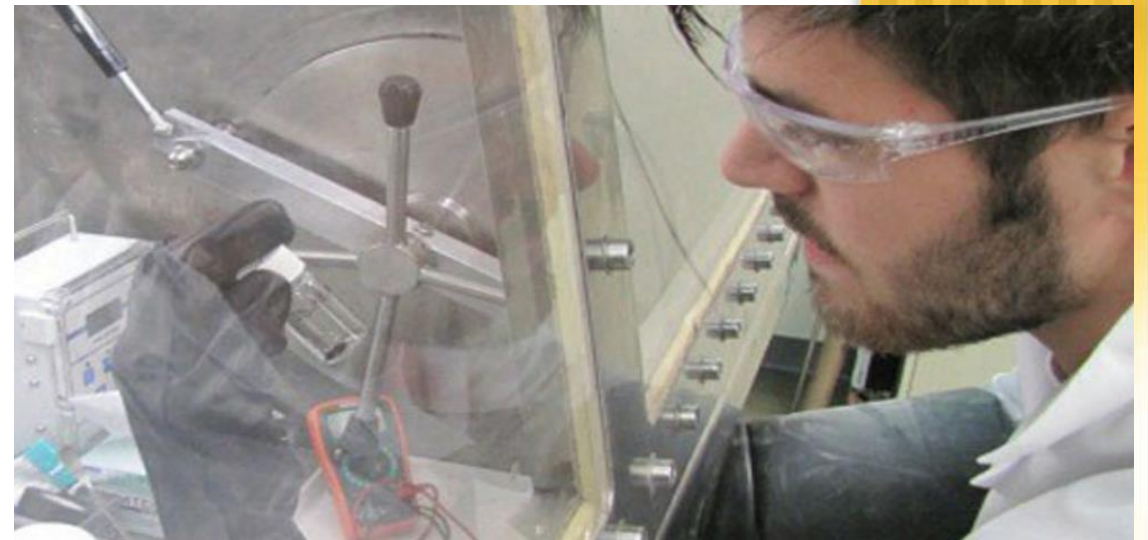
Benefits of focus: campus strategy development

- Following the lead of Online and Wilsonville, Klamath Falls will be developing a campus enrollment strategy:
 - Built upon the emerging department 5-year strategies;
 - Identifying the unique student markets and value proposition that Klamath Falls provides;
 - Leveraging the resources at the Klamath Falls campus, such as student housing, student life, athletics and other full university student experiences.



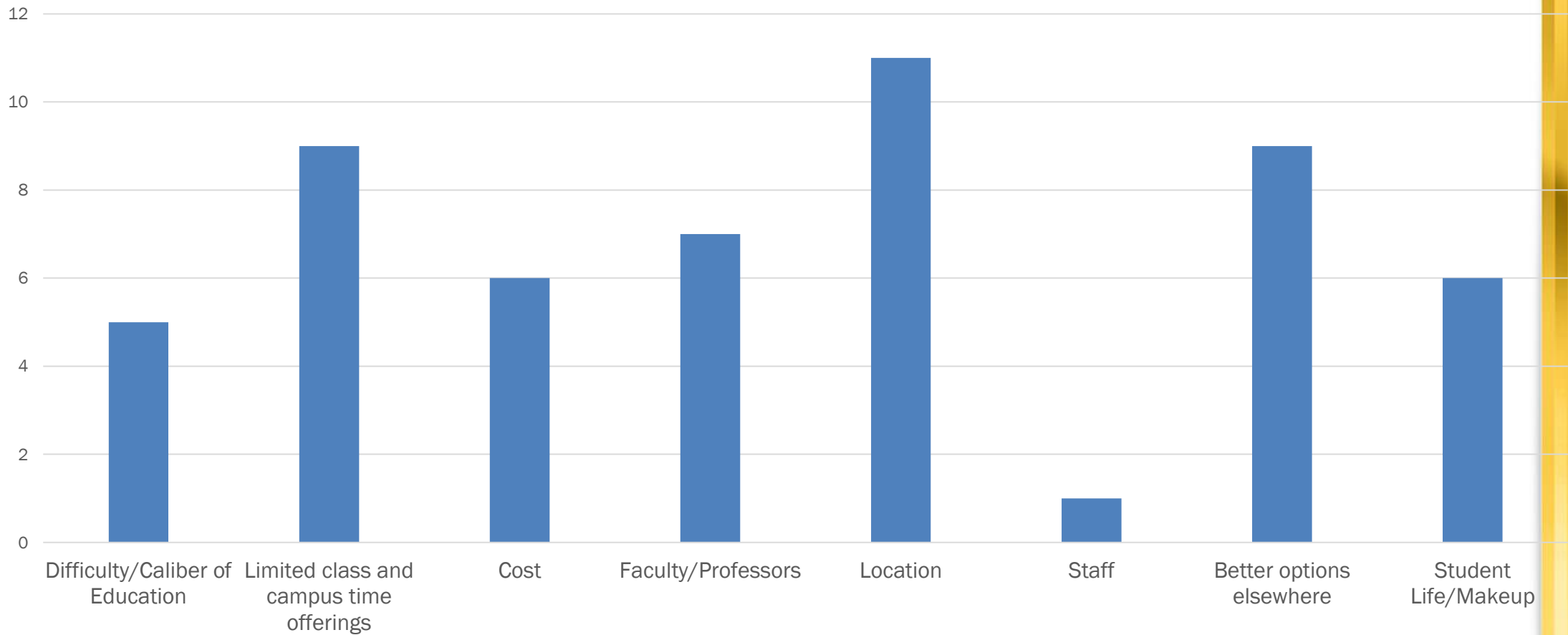
Same market strengths apply...with unique opportunities

- Oregon Tech programs are high demand, high value:
 - Employer needs are statewide. Klamath Falls benefits from the high market demand, even if not all disciplines are needed in the local area.
 - Klamath Falls has unique positioning for rural health initiatives.
 - OREC provides foundational investments for the highly recognized renewable energy engineering program which leverages the Klamath Falls campus resources.



*We need to ask...often

Student Quotes—Why they have thought of leaving (not just about KF).



*From a 2015 student survey.



ENROLLMENT AND GROWTH STRATEGIES

EXTENSION CAMPUSES

HALLIE NEUPERT

Seattle and our Boeing partner

- Seattle has been disconnected strategically from Oregon Tech.
- New program director will be working on strategic planning.
- There is an opportunity in WA is to join with qualified community college to offer a fuller set of courses.
- Seattle has an excellent business model which operates in a lean administrative environment, and returns money to Oregon Tech.
- Great relationship with Boeing. This approach could be a model for other such extension campuses.



Chemeketa

- Strong community college partner: provides outreach, shared facilities.
- Community partner: patient referral service.
- Dental Assistant students attracted to B.S. degree completion program.
- Stable, fully-enrolled, capped program.



Recap

- Oregon Tech is responding to national and state trends, and is well positioned for value in the markets we serve.
- Oregon Tech is deepening its strategic planning practices at the campus and program levels.
- Enrollment initiatives have been untethered from these emerging program and campus strategies. Alignment will increase effectiveness.
- Different tuition approaches may be necessary to address significant faculty overloads which may be capping growth and to improve adjunct compensation in the Portland area while remaining financially viable.
- Strategic enrollment management leadership is long overdue.





BACKGROUND SLIDES

University-wide: maturing our recruiting/admissions practices

- Fully exploit the capabilities of Recruiter, our student client relationship manager.
- Align our recruiting/admissions efforts to identified student market segments.
- Make a tangible change in brand awareness.
- Focus on the student—and what is in it for them—in our website, collateral and other communications.
- Double-down on pursuing qualified sources of students, especially community colleges and industry connections.
- Build and manage a website that reflects Oregon Tech technical excellence.



BACKGROUND: RECRUITING

How did you hear about Oregon Tech?
(check all that apply)

*Our e-presence is key;
as is our brand,
esp. with influencers.

*From a 2015 student survey with
415 respondents

Answer	Response	%
Did a web search	120	40%
An online link or advertisement generated on another webpage I was visiting	6	2%
Word of mouth--through a friend or acquaintance	142	47%
Word of mouth--through a coworker	18	6%
Oregon Tech visited my school	23	8%
At a college fair	31	10%
Through a counselor or advisor at my high school	44	15%
Through a counselor or advisor at my community college	31	10%
Through an employment agency	1	0%
From the radio	4	1%
Received mail from Oregon Tech	30	10%
Through a print advertisement	8	3%
Via social media--facebook, Twitter, Instagram, etc.	6	2%
At a conference	4	1%
Other	63	21%

