

ENROLLMENT IMPACT 2010:

Retaining, Reaching, Recognizing



Abbreviated Strategic Enrollment Management Plan (SEMP)

(2005 – 2010)

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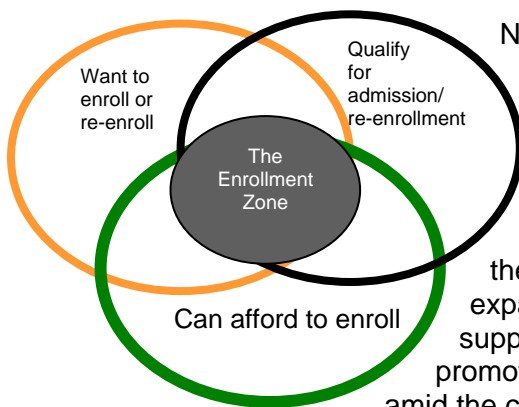
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I. Executive Summary

Norfolk State University is positioning itself to thrive in an ever evolving and increasingly complex global environment. Enrollment must grow. Students who can reach their potential and achieve their educational and career goals as a result of their experiences at NSU are available in multiple markets. The 2004-2009 Strategic Plan entitled *Capacity-Building Toward Competitiveness: Pathway to the Future* provides the impetus for enrollment management planning. The University will address enrollment by retaining a higher percentage of students, utilizing multi-faceted approaches to recruit specific target markets, and deploying strategies that support increased graduation rates. No silver bullet for enrollment growth exists. The Strategic Enrollment Management Plan (SEMP) addresses these issues utilizing historical data, guidance from several Commonwealth agencies and its General Assembly, population projections, geo-marketing and other sources. Existing landmass, services and the desire to promote quality, not necessarily quantity, guide the growth potential over the next ten years.

NSU will continue its strong tradition of liberal studies. However, to meet the needs of the new economy, increase the technical competencies required in a highly technical society and support workforce development, NSU will expand beyond liberal studies to focus its energy on building strong, competitive programs in several critical science areas. By developing specific niches, resources can be deployed to support strategic goals. By the fall of 2010, NSU has projected enrollment at slightly more than 8,000. This 30% increase is an ambitious undertaking which will require strategic decisions, partnership development, multiple sources of funding and implementation of strategies included in this plan. Projected growth for minority participation in higher education justifies the rationale to stretch the enrollment vision. The **THREE Rs**, retaining to achieve success, reaching 8000 by 2010 and recognizing excellence in graduates provide the premise for building this plan.



NSU will leverage existing and new resources to improve student recruitment, retention and graduation. New programs, better service delivery, infusing technology within the curriculum and administrative practices, training, faculty and staff recognition, and increased accountability represent a few of the steps required to increase enrollment. NSU is enthusiastically embracing the challenges ahead by focusing on targeted students, expanding territories, strengthening academic programs and support services, developing additional partnerships and promoting greater synergy among units. Repositioning NSU amid the competition will require image enhancements that build upon institutional strengths from all venues, better communicate the NSU story of the past, present and future and strategically market a cross section of publics including the millennial students (those born after 1980). The optimal 'Enrollment Zone' of 8,000 by 2010 is the composite of several components summarized as those students (and their parents) who want to enroll, qualify for enrollment and can afford to enroll. This plan addresses each component within several sub-sections.

The most immediate needs to support additional enrollment growth and improved service delivery include executive endorsement to invest in human capital, improve the use of technology, revise business processes, and collect and utilize data from a variety of sources.

As outlined in the Strategic Plan, facilities are an important component of the **THREE Rs**. New academic buildings, residence halls, service buildings and student recreational facilities are necessary to remain competitive as students seek attractive amenities for their investment.

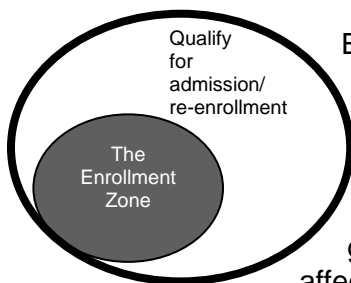
Pricing strategies and financial aid leveraging are also important factors in the delicate balance of remaining affordable, ensuring access for students prepared to attend college and expanding the recruitment reach. NSU must appeal to students that can afford to pay a larger portion of their tuition. Equally important is the need to increase scholarships.

Organizational restructuring of units will support the reduction of silos, provide synergy to improve the use of resources and promote the achievement of strategic goals.

This plan will be assessed annually and continually modified to ensure the document serves as the roadmap to assist in achieving enrollment goals. During the course of implementation, a balanced scorecard approach to reporting key performance indicators will be developed.

Although this document contains a voluminous amount of data, the SEMP is more than metrics. Norfolk State University must examine enrollment growth and planning in the context of its holistic complexity as well as the many factors that may influence enrollment growth and campus viability. Matrices presented in the executive summary provide summary strategies required to reach 8,000 students. Additional information and details are provided within the body of this Plan. An appendix is provided for informational purposes and will be used to better understand segments of the report that would be beneficial to those assigned to designated segments of the SEMP.

V. Student Profile



Education is the great equalizer for social equality. Any improvements made to provide access to a larger number of qualified students will enhance the common good. The profile of NSU students is to a great degree reflective of its mission. NSU is committed to serving underrepresented minorities and ensuring a level of access that promotes quality and a reasonable degree of projected success for graduation. Establishing admissions standards has significantly affected the profile and number of students. A moderate degree of selectivity provides a base for understanding the academic preparedness of a student and gives the institution an indication of the support required versus what the institution can reasonably provide to promote student success. SAT scores tend to correspond very closely to the national average of Black students around the nation. The most recent averages of 890 SAT and 2.65 high school GPA demonstrate the success of the strategic effort to improve the student profile. As an urban, primarily commuter and nontraditional institution, NSU faces a unique set of obstacles not found in a traditionally residential campus. Seventy percent (70%) of the students commute daily and a corresponding percent are Virginians. NSU has increased its appeal to exceptional students however, a significant portion of the students (as much as 65%) have traditionally come from inner-city schools facing challenges that may impact their ability to adequately matriculate and progress to graduation within time parameters as might be expected. Because of incomplete or inconclusive data provided by students, only a third of NSU students can be validated as first generation college attendees. However, it is surmised that approximately 60 percent of the current student population are first generation students.

The average student's family income is less than \$31,000 and below the average for the region and the state as reported in Census data. NSU students are highly sensitive to price increases,

changes in financial policies and have a high degree of course mobility as they shop for courses and enroll in multiple universities, community colleges and engage in online instruction.

Compared to the national averages reported by *The Chronicle of Higher Education*, a higher proportion of NSU students work outside of the campus. The median age of undergraduate students is 24 while the average (mean) age is 21. Many students enroll with family obligations thus higher education is often not the number one priority. This impacts their ability to focus solely on their academic pursuits, satisfy all financial commitments, and continue to matriculate according to the necessary schedule to support timely degree completion.

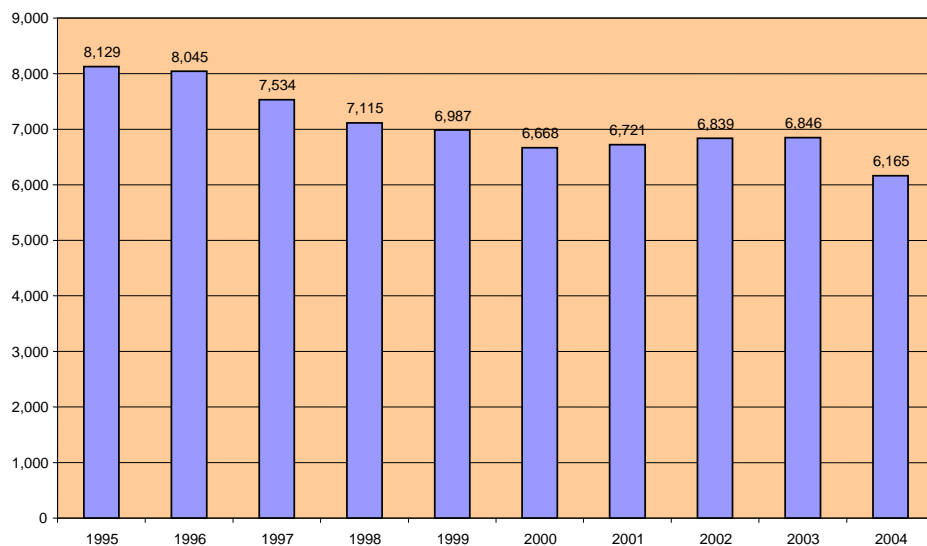
Financial aid is discussed in greater detail further in the report. It is important at this point to emphasize the importance of understanding Satisfactory Academic Progress (SAP) and the affect of those standards on enrollment. Students that do not successfully complete 67% of all course work attempted lose their eligibility to obtain federal funding. This is a significant standard as it impacts retention rates.

These data provide a realistic view of the current student profile. As NSU expands its academic offerings, increases its reach for higher quality students and provides the amenities that students desire, it will be important that the majority of the new students will find the institution appealing for the investment they must make. Consistent with the mission to serve this population, NSU will continue the current admissions standards and review those standards every two to three years to ascertain the effectiveness of the standards in conjunction with the mission, success of students and markets served.

VI. Enrollment Goals

NSU Enrollment Goals are aligned with those from the State Council of Higher Education. Ten-year enrollment trends as indicated below provide the impetus to modify existing practices where necessary and introduce new strategies that will increase enrollment growth.

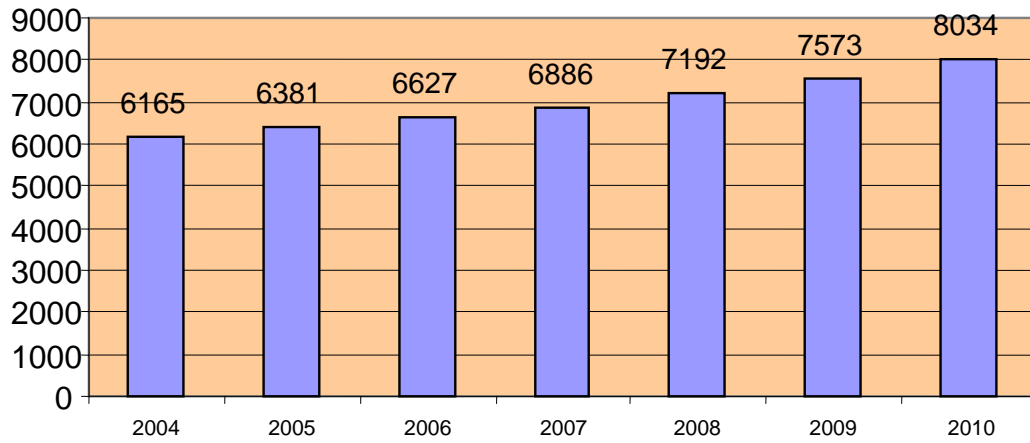
**Fall Headcount Enrollment Trends
1995-2004**



Enrollment projections reflect some historical patterns, modeling, forecasting, program development and currently provide the best estimates. It is understood that enrollment, retention and graduation rates fluctuate and projections may require adjustments as additional information is obtained. NSU with the endorsement of

SCHEV has devised enrollment projections to reach slightly more than 8,000 (30%) through 2012. This optimistic growth will require the execution of coordinated strategies. The goal is to increase enrollment by improving retention and increasing the number of freshmen, transfers and graduate students. Specific emphasis areas are listed in the sections that follow.

**Projected Headcount
2004-2010**



	2004	2005	2006	2007	2008	2009	2010
Headcount	6165	6381	6627	6886	7195	7573	8034
Increase		216	246	259	306	381	461
% Increase		4%	4%	4%	4%	5%	6%

Underlying Enrollment Growth Essentials

1. Growth will be gradual and consistent across levels
2. The freshman class must grow
3. First-year retention trends have been reinstated to slightly exceed previously obtained levels
4. Additional aid and scholarships will be provided to support the freshman class, retention efforts and graduate students
5. Transfer students will boost enrollment
6. In-State (~73%) and Out-of-State (~27%) mix will continue to support fiscal stability
7. Current part-time trends will continue
8. Current scheduled capital, auxiliary and renovation projects will be funded

Retention Targets

Retention is the number one component required for sustained enrollment. Retention rates must incorporate best practices that are the best fit for NSU. Strategies required for a consistent 73% retention rate must be fully developed in a comprehensive Retention Plan developed by The Office of the First-Year experience in collaboration with Academic Affairs,

Student Affairs, academic departments and Enrollment Management. Historical retention rates and goals for retention are detailed in the adjacent table. To ensure

Fall Cohort Term to Subsequent Term	First to Second Year	Second to Third Year	Third to Fourth year	Fourth to fifth year	Six-Year Graduation rates
Fall 1999 - 2000	64%				24%
Fall 2000 - 2001	66%				22%
Fall 2001 - 2002	71%				27%
Fall 2002 - 2003	70%				28%
Fall 2003 - 2004	63%				27%
Fall 2004 - 2005	66%	52%	47%	35%	29%
Fall 2005 - 2006	68%	53%	48%	36%	30%
Fall 2006 - 2007	70%	55%	49%	37%	32%
Fall 2007 - 2008	71%	56%	50%	39%	33%
Fall 2008 - 2009	72%	57%	51%	40%	34%
Fall 2009 - 2010	73%	58%	52%	41%	35%

graduation rates, retention must be measured for each entering class at each fall term.

Additional strategies for spring retention tracking may be utilized to gauge progress. However, it is realistically more manageable to report these indices during the fall of each year.

Overall University retention cannot be actualized without achieving rates within each academic school and major. A 73% retention rate has been established as a target for each school. Realizing that several majors within a department will have varying rates, targets set for each school are more realistic and manageable measures. It should be noted that each departmental retention rate will be provided to ensure accountability and indicate specific disciplines that should be targeted for improvement. The School of Science and Technology has realized retention gains and is working with First -Year Experience, Academic Affairs and Enrollment Management to share successful strategies in student retention. Other models also should be investigated and adopted to the extent feasible and to the extent funding will permit.

Experiences outside of the classroom impact retention. Improving and increasing student engagement on a commuter campus is challenging. Realistic expectations must be established while considering the campus profile, location and relatively low student residential population.

By improving a sense of belonging for students, NSU improves the probability that students will want to remain at the University provided all other obstacles are either removed or held constant.

Advising is a central and key element toward retention and graduation. As advising models are explored, and best fit practices are incorporated into the fabric of instruction, tutoring, and mentoring, intrusive advising must continue to be strengthened. Through rigorous assessments of student engagement and learning, strategies should be modified to reflect any changes in student learning, faculty participation, staffing for advising, campus climate or other factors. In short, the appropriate methods for advising students must be flexible, manageable, affordable, and most importantly consistent with meeting their needs.

Freshman Class Targets

Freshmen increase gradually from 1,015 to 1,300 (28%) by 2010. Slight increases provide the ability to shape the freshman class through an improved profile leveraging scholarships without increasing admissions standards beyond market capacity. Higher profile students will continue to be an active component of target recruitment. However, there is currently no available data that suggest that NSU should increase its admissions standards. Projections level off in 2009 to ensure that adequate support systems are available. Strategies to achieve these targets are outlined the Recruiting Strategies section of this document.

	2004	2005	2006	2007	2008	2009	2010
Freshmen Headcount	1,015	1,100	1,185	1,220	1,270	1,300	1,300

Transfer Targets

Currently 51% of the new transfer students matriculate from the Virginia Community College System (VCCS). Articulation Agreements currently exist with NSU and all of the VCCS institutions. Program specific articulation agreements with area community colleges will continue to be reviewed periodically and adjusted accordingly. The most recent initiative is to provide improved portability of classes outside of the general education core by partnering with officials on various campuses. Academic Affairs has established a process to ensure Articulation Agreements are in proper alignment with state requirements.

New scholarships specifically established for community college students will be provided beginning fall 2005 and should be continued to build the momentum required for market penetration. Scholarships will provide transitional resources to assist with tuition and reduce the time to degree completion. The elimination of raced-based scholarships has provided obstacles to maintain student diversity. NSU realizes the potential to improve its diversity through the attraction of students from the community colleges. Emphasis will be placed on providing resources to students majoring in education, social work and nursing. Resources have also been earmarked for 2005-06 to hire University staff exclusively charged with collaborating with the community colleges, assisting transfer students to successfully navigate through administrative processes and facilitate student transition to university life.

	2004	2005	2006	2007	2008	2009	2010
Transfer Students	364	410	470	530	550	610	630

Graduate Student Targets

NSU has implemented several new graduate programs as outlined in the OCR Accord and funding structure. Several of these programs will further undergird NSU in a new niche area of

Science and Technology. Additional programs that are aligned with strategic goals will be proposed over the next five years to enhance academic opportunities for citizens of the Commonwealth and abroad. As part of the NSU Strategic Plan, there will continue to be a systemic process to monitor, provide cyclical program review and reallocate resources to growing programs. New Graduate student enrollment is expected to increase by 20%. NSU projects that at least 70% of those students will reside in Virginia. Overall enrollment is expected to more than double by 2010.

A feasibility study of a separate Graduate School is currently under development. The divisions of Academic Affairs and Research and Technology will provide the proposal and work with faculty and administrators to make recommendations. The transition from an Office of Graduate Studies to a Graduate School is a complex undertaking requiring reorganization of faculty, new revenue streams as well as reallocation of existing resources.

	2004	2005	2006	2007	2008	2009	2010
Graduate Students	244	266	298	345	414	515	525

Degree Completion Targets

Recent degrees conferred have averaged more than 1,000. Projections in the number of degree recipients include efforts for improved retention from all levels, increased numbers of transfer students specifically from the Virginia Community Colleges and graduate program completions. Programs such as those under the OCR Accord will contribute to this increase. Financial support will be a factor to assist students in continuing and fulfilling their educational aspirations.

	2004	2005	2006	2007	2008	2009	2010
Degree Completers	1,008	1,031	1,053	1,075	1,099	1,124	1,152

Summer School Targets

Summer school, though small in recent years, affords the University an opportunity to provide course offerings to an array of students including new students, students seeking recertification, graduating seniors, current students continuing toward timely degree completion, and those seeking professional development through credit and non-credit continuing education course work. Summer school has declined 5% from 2000 to 2004 however full-time equivalent (FTE) has increased by 11%. In summary, fewer students are enrolling but those who do enroll are taking more classes than in previous years. Peak summer enrollment of 2,570 in 2001 reflects several external partnerships with area schools to provide certification for teachers. Summer school is designed to be fiscally self-supporting. However, there is a window of opportunity to expand the current enrollment beyond the dominant junior and senior enrollment of 42%. Several programs offered for new students contribute to the summer enrollment but should not be used to support enrollment growth. Careful review of summer program offerings and course sequencing has been appropriately under review in Academic Affairs. The targets below are modest gains until such time as data is collected and a plan is created. The development of a marketing plan will be beneficial in expanding program offerings and impacting student progression. Consulting with each school on particular offerings and potential audiences will be important. Most students do not appropriately plan for an entire academic year that includes summer school and are often ineligible for additional aid. Without proper guidance, advising and financial planning, some students may find summer school helpful to continue progression but financially infeasible. Finally, the compressed cycle of summer school impacts the types of courses that can be successfully completed.

	2004	2005	2006	2007	2008	2009	2010
Summer Headcount	1995	1995	1995	2063	2155	2155	2155

VII. Diversity Goals

Norfolk State University, the largest HBCU in Virginia, offers associate, baccalaureate, masters', and doctorate degrees to a diverse student population consisting of 86% African-American students, 1% Non-Resident Alien students, < 1% American Indian students, 1% Asian students, 2% Hispanic students, 7% White (non-Hispanic) students, and 3% unknown race students in the year 2004. In alignment with its mission, NSU will continue to promote and actively engage in strategies to promote diversity within races, ethnic classifications and socioeconomic status. Higher education to all students becomes the great equalizer.

NSU re-affirms its commitment to minority students by actively recruiting students from all walks of life. It is important to the institution to provide an enriching college experience for all students and, to the extent possible, model the changing demographics of the communities in which NSU serves. Diversity to NSU is more than a number of particular students on the campus. Ensuring diversity is not a system of quotas or exclusionary practices. The commitment to access and diversity in the rich urban environment is a natural fit for NSU. NSU will aggressively seek new strategies to recruit and graduate Black males and Hispanic students. NSU will not abandon existing efforts to increase overall minority, white or international student enrollment. However, focused recruiting and support strategies are necessary to maximize limited resources. NSU seeks to become a premier leader institution in diversity among its students. Regardless of race, students should be attracted to the University for the academic programs, location, history and commitment to a student-centered environment. The diversity of the institution will be one additional differentiator that will make NSU unique among its competitors. Retaining, reaching and recognizing potential and contributions of graduates as they impact the community, the Commonwealth and the nation will be continuously reinforced.

Enrollment is an outgrowth of the institutional commitment. All targets outside of first-time freshmen and transfer students reflect new and returning students. Attrition and graduation have been accounted for in the data presented in subsequent sections.

Black Male Targets

In 2005 there was a reemergence of the Black male college student in the media. Highly publicized statistics on Black male underachievement, reduction in the number of males attending college, high rates of suspension, crime and the increased likelihood to be diagnosed as learning disabled captured the attention of the masses. This plight is not foreign to NSU nor is the focus on the Black male an attempt to jump on a media bandwagon. According to a 2004 report from the National Center for Education Statistics, Black male enrollment has experienced declines, slight fluctuations or very small increases since 1976. Black female students are outpacing Black males to the extent that overall college going rates for minorities can be misleading. NSU has experienced a decline in Black male enrollment over the past five years from 2,034 to a current 1,909 in the fall of 2004. This reduction must also be viewed in the context that overall enrollment declined during this time. The overall percentage of Black males appears to be consistent in relationship to enrollment, however, one must be concerned that the reduction in the number is significant. It is important to note that the reduction of more than 250 over the past three years may translate to forever lost opportunities for these men.

The fabric of the Black communities served by NSU rests on the success of families and Black males. The recent

	2000	2001	2002	2003	2004
# of Black Enrollment	2034	2089	2161	2102	1909
% of Black Males	30.5%	31%	31.6%	30.7%	30.9%
Total Student Enrollment	6668	6721	6839	6846	6165

attention and declining numbers requires a re-commitment and new strategies to address the problem more successfully. There are many environmental factors that influence Black male achievement, enrollment, retention and subsequent graduation. Many of which NSU is unable to control. However, in an effort to impact the community, increase enrollment and meet demand for minorities in the workforce, NSU must develop specialized programs and early intervention strategies to work with Black male youth. Outreach programs that have the commitment of the campus and internal champions that will shepherd and work with these programs will provide the basic support required.

NSU must partner with existing community efforts and local public schools at all levels to the extent possible to utilize and leverage its already limited resources. Community-based efforts specifically focused on youth should have active representation from NSU faculty, staff and students. Incorporating service learning with students could provide a powerful tool for students preparing to assume leadership within their communities. NSU has the ability to take the lead on many of these efforts but must be sure to remain focused on the areas where the greatest impact can be realized. NSU will be unable to become a part of every organization, but the selection of specific programs that will be supported to the greatest extent possible is warranted. Those organizations should be chosen during the 2005-06 academic year and periodically reexamined. Exploring current efforts and the memberships of current faculty and staff would prove beneficial. Currently there are several members of these organizations on campus and efforts to further support organizational goals by forming new partnerships or increasing support to existing partnerships would be a useful method towards understanding the scope of the problem, eliminate duplication of community efforts and provide an opportunity to provide further outreach within the community.

Establishing targets in this regard is difficult but necessary to realistically reach Black males through specific strategies. The admissions process is only one method of targeting Black males. Employing recruiters that understand and are able to comfortably work with prospective students is one necessary step. To improve student retention, efforts such as the ACCESS Black Male Mentoring Program should be expanded to the degree possible. Close monitoring, data gathering and reporting on students will be necessary to validate resource allocations.

Percentage of enrollment is a more realistic method of establishing targets. As enrollment increases, the percentage of Black males is expected to increase as a result of additional strategies in recruitment, support services and retention efforts.

	2004	2005	2006	2007	2008	2009	2010
Black Male % of Enrollment Targets	30.9%	30.9%	31%	32%	33%	33%	34%

Hispanic Targets

Hispanics represent approximately 18% of the traditional college-bound populations but only 9.5% of the nation's college students and 6.6% of the 4-year college population (Schmidt, 2003). Forty-seven percent of this population lives in the West. However, along with growing rapidly, this population is spreading out and moving into communities in the South and Midwest where few Hispanics have settled before. Representing 3.1% of the Hampton Roads residents, this growing segment of the area's population must not be overlooked in NSU's growth potential.

Overall, Hispanics are the least-educated major racial or ethnic group, with slightly more than 11% of those over the age of 25 having a bachelor's degree, compared with about 17% of Black, 27% of White, and 47% of Asian-American adults in the same age. Non-Hispanic, white high-school graduates are about twice as likely as their Latino counterparts to earn a baccalaureate degree. Only 75% of Latino traditional college-age students enroll full-time. Part-time college enrollment is considered to be a risk factor associated with accumulating college credits with no degree to show for the effort. Part-time enrollment may be due to pressure from family to contribute to the family welfare as soon as they are old enough to work. This commitment often takes precedence over the commitment to schoolwork. A recent 2005 report by the Latino Student and Educational Pipeline concluded after extensive research that Latino students are far more likely to begin pursuing a degree at a four-year institution rather than at a community college. This provides an opportunity for NSU to expand its current Hispanic enrollment.

Best practices have been explored with regard to Hispanic student enrollment, retention and graduation in alignment with the mission to educate an ethnically and culturally diverse student population. Among high school graduates 18-24 years old, 35% of Hispanics are enrolled in college compared to 46% of whites and 40% of blacks. Extensive research was conducted to determine what models for Hispanic student retention are being utilized at successful peer institutions and what recommendations can be made to enhance the Hispanic student, recruitment, retention and graduation rate at NSU. Information gathered included: the profile of the Hispanic student population at NSU and peer institutions, current retention practices aimed at Hispanic Students at NSU, retention practices at peer institutions, and information on the Posse Foundation, a nonprofit organization that partners with select universities and works with them in three principal areas: recruitment, assessment, and retention of populations representative of a rich demographic mix.

In order for NSU to actively penetrate the Hispanic market, current strategies must be

	2000	2001	2002	2003	2004
Hispanic Enrollment Trends	85	83	98	110	110

expanded and new ones implemented. Spanish-speaking admissions counselors and recruiters are a necessary component. Support services such as the Multicultural Office, English as a Second Language (ESL) offerings, campus organizations and training for faculty and staff can support these efforts. The growing Hispanic population affords NSU the opportunity to expand its current market share by actively recruiting and graduating this population of students. Targets for Hispanic enrollment are provided for direction. Targets in no way reflect limitations or quotas. Neither will these targets deter efforts to recruit other student populations. NSU will increase enrollment and its continued viability by targeting growing student populations.

	2005	2006	2007	2008	2009	2010
Hispanic Enrollment Targets	115	130	160	190	210	220

VIII. Graduates and Graduation Rates

Recognizing competitive graduates is the ultimate measure of success by which universities are evaluated. NSU is no exception. Increasing graduates and graduation *rates* are two distinct activities but they are not mutually exclusive. All graduating students within a given year are reported in the total number of degrees conferred (synonymous for graduates). Graduation rates report a percentage of specific full-time degree seeking freshmen that enroll during a specific fall term. Those students are subsequently tracked for six years and the rate in which they graduate during that time is reported as a graduation rate. Students that “stop out,” transfer in or out, take longer than six years and graduate-level students are not counted in graduation rates. However, those students that complete requirements and graduate outside of the boundaries of the federal definition of six-year graduation rates are counted in the overall graduation numbers reported. Regardless of the definition used, NSU must be committed to maintaining academic quality while increasing both the number of graduates as well as the rate.

Benchmarking graduation rates with appropriate peers is important in the development of realistic targets. The complexities of all internal and external forces that influence graduation rates have been researched in depth and exceed the scope of this Plan. However, it is beneficial to examine appropriate graduation rates for like institutions and to be conscious of those institutions that have similar entering student profiles but have exceeded expected levels of graduation.

Graduation Rates for Various Peers	
Norfolk State University	27%
National Public HBCUs	34%
SCHEV Peers	34%
National Private HBCUs	38%
MEAC Peers	43%

The primary driver to increase the graduation rate is progression to each subsequent level. Students must be able to navigate through the curriculum on schedule either by increasing their course loads during the semesters or attending summer school. Class sequencing and flexible scheduling is important in the effort to keep students progressing at an acceptable rate. A comprehensive retention plan is needed to address the complexities of student preparedness, financing, engagement, faculty assistance and advising. Establishing learning communities is an excellent proven method to combat student attrition. However, NSU is a primarily commuter campus which poses challenges that require additional or alternative strategies to best fit the particular student challenges.

Financial challenges faced by a significant portion of the student body will be discussed later in this plan. It should be noted that the absence of detail in this section does not reflect a lack of importance or understanding of the relationship between persistence, graduation and financial support.

Monitoring student progression is an important factor in supporting student graduation. Reports on student progression by cohorts can assist advisors and faculty in monitoring student progress. Retrieving data on high attrition and gate-keeping courses will be useful in examining instructional methods and students success. Utilizing assessment report data to improve student success is another element to improve the number of graduates as well as increase the rates.

Improving the administrative processing of paperwork and streamlining the flow of finalizing grades and conferring the degrees will decrease the number of students who complete academic requirements but are unable to be reported until the next year due to delays. Each of these improvements will increase graduation rates. Targets for both the number of degrees conferred (includes associate, baccalaureate and graduate degrees) and the rates are listed below.

	2004	2005	2006	2007	2008	2009	2010
Total Degrees Conferred Targets	1004	1031	1053	1075	1099	1124	1152

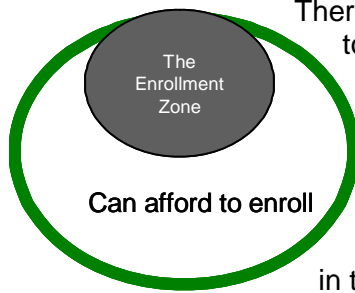
	2004	2005	2006	2007	2008	2009	2010
Associate Degrees Conferred Targets	65	64	65	66	68	69	71

	2004	2005	2006	2007	2008	2009	2010
Baccalaureate Degrees Conferred Targets	730	772	789	806	823	843	863

	2004	2005	2006	2007	2008	2009	2010
Graduate Degrees Conferred Targets	209	195	199	203	208	212	218

	2004	2005	2006	2007	2008	2009	2010
Six-Year Graduation Rate Targets	28%	27%	29%	30%	32%	33%	34%

XII. Pricing Strategies



There are several factors that warrant consideration when reviewing the topic of pricing strategies in higher education. A summary of those factors includes changes and trends in federal and state funding for higher education, an increasing need to take account of consumer price sensitivity, and overall increase in competition for resources and students. NSU must be careful to target and recruit students that are able and willing to pay. The significance of financial aid on this segment of achieving an adequate enrollment zone is discussed in the Financial Aid leveraging section of this Plan.

The State Council of Higher Education for Virginia (SCHEV), in the Dec 2002 system-wide strategic plan for higher education report, acknowledges several factors influencing the delivery of higher education in Virginia institutions: budget shortfalls and fewer resources, loss of top-notch faculty, need to repair or renovate more than half of Virginia's college buildings, tuitions on the rise, and review of the surmounting amount of state and federal aid needed to support disadvantaged students that reached \$34 million in 2004. The strategic plan does recognize that increased enrollment demand and decreased funding for higher education will compromise access to higher education for Virginia citizens unless adequate operating and capital resources are ensured by providing necessary operating funds and providing student financial assistance to ensure broad access to higher education (2002). Beyond this statement, there were no specific strategies given within this report that would address these deficiencies.

National Trends

The rising cost of education has been one of the major topics of higher education discussion from parents to Congress. Because recent tuition and fee increases have outpaced the consumer price index, rising more rapidly than inflation, the concern that aid packages are not keeping pace with the educational sticker price is valid.

Financial aid to postsecondary students in the US rose to more than \$122 billion in 2003-2004, an increase of 13% over 2002-2003, according to the College Board (2005). Grant aid grew by 8% while loan dollars grew by 19%. In 2003-2004, loans constituted 56% of all postsecondary student aid, while grants comprised 38%, and work study/tax credits accounted for the rest. For undergraduate students, grants constitute 44% of aid, while loans make up 49%. The magnitude of these dollars does not appropriately communicate the shortfall in aid. Although overall dollars have increased, there has not been adequate aid to support the increases in cost.

There is virtually no evidence of a relationship between tuition increases and financial aid packaging. The National Commission on the Cost of Higher Education's 1998 Report to Congress entitled *Straight Talk about College Cost and Prices* asserted the following:

Institutions of higher education, even to most people in the academy, are financially opaque. Academic institutions have made little effort, either on campus or off, to make themselves more transparent, to explain their finances. As a result, there is no readily available information about college costs and prices nor is there a common nation reporting stand for either."

Some of the intense criticism has evolved from a misunderstanding between the cost of education and the price students pay. Cost and price are distinctively different as cost does not

provide any indication of other resources used (such as state appropriations) to pay for educating a student. In studies conducted by NACUBO and the U.S. Department of Education's National Center for Education Statistics (NCES), decreasing revenue from government appropriations – in particular, state appropriations – was the single most important variable associated with tuition increases at public four-year institutions. Though a detailed analysis of cost is not the focus of this segment of the SEMP, it is important to note that cost is component of enrollment planning that must not be ignored. However, the call for accountability forces institutions to begin to closely examine rising costs particularly as they impact access and desired enrollment growth. Institutions must increase its communication to its constituents regarding cost and price in a manner that is easily understood providing additional disclosure as necessary.

In addition to changes to federal and state aid influencing the pricing of education, there is an increasing need to be aware of consumer reaction to prices, also known as price sensitivity. The student, parent, or student aid provider often view higher education prices relative to how much they pay for other goods and services. The Consumer Price Index for Urban Consumers (CPI-U) is used when making these comparisons to evaluate the growth of tuition and fees against the other consumer prices for housing, transportation, food, apparel, medical care, entertainment, and other goods and services. Consumers notice price increases and become concerned when prices for important goods and services, such as health care and education, grow faster than their incomes (2004). For example, according to the Economic Report of the President in February 2003, the cost of health care grew by 75% and tuition and fees for four-year public colleges and universities grew by 120% between 1990 and 2002 while U.S. per capita income grew by 58% during the same period, which was more than prices in general (40%), but not more than health care and education (2004).

Virginia Trends

Overall affordability of higher education in Virginia, according to the 2004 Measuring Up report from the National Center for Public Policy and Higher Education, is consistent. Over the past decade, Virginia has made no notable progress in providing affordable opportunities for higher education, receiving a D- on the state report card for lack of improvement. The state's investment in need-based aid is very low when compared with top-performing states. To make up the difference, undergraduate students borrowed on average \$3,521 in AY 2003 whereas NSU students borrowed an average of \$3,112, constituting 22.9% of their aid award in AY 2003. Debt burden for undergraduates graduating from NSU in AY 2001-2002 was \$15,042, as compared to the national average of \$15,375.

Recent legislation in the form of the Higher Education Restructuring Act with support from the Governor provides the opportunity for all state institutions to receive greater autonomy in several facets of operations, decision making and overall management. In accordance with the Act, institutions must be committed to:

1. Providing **access** to higher education for all citizens throughout the Commonwealth, including underrepresented populations, and, in accordance with anticipated demand analysis, **meet enrollment projections** and degree estimates as agreed upon
2. Ensure that higher education remains **affordable**, regardless of individual or family income

Performance indicators will be developed to measure whether institutions are meeting the state's objectives. The Governor will subsequently develop performance indicators for financial and administrative management. Institutions which are certified as meeting the state's objective

will receive these financial incentives: interest earnings on tuition and fees; mandatory re-appropriation of unexpended balances; a rebate on purchases made through the small purchase charge card; and a rebate on sole source procurements made through that state's automated procurement system for which they have paid fees. For the immediate future, NSU seeks to stabilize itself at the level one status. As improvements are made, level two requirements and the feasibility will be carefully examined.

Institutional Pricing

NSU has conscientiously made efforts to monitor pricing. In examining the price sensitivity of students and the need for their families to adequately prepare, establishing price must include the examination of impact for the students served. Incorporating best practices in establishing priorities, monitoring institutional costs and expenditures, and setting a reasonable price are interrelated. In alignment with its mission, NSU must maintain affordable tuition and fees. The price that a student pays must allow the University to provide a high-quality education. There are a number of considerations when discussing and determining pricing. According to a 2003 survey administered to state higher education financial officers by State Higher Education Executive Officers (SHEEO), the top sixteen factors used to set tuition were reported as follows:

- 1) State general fund appropriations
- 2) Prior year's tuition
- 3) Cost of instruction
- 4) Institutional mission
- 5) Tuition charged by peer institutions
- 6) Public concern or opinion about cost of higher education
- 7) Availability of/appropriation for financial aid
- 8) Other student fees or charges
- 9) Consumer Price Index (CPI)
- 10) Media pressure or attention to higher ed costs
- 11) Tuition policies of comparison states
- 12) Higher Education Price Index (HEPI)
- 13) Mix of individual and public beliefs about higher education
- 14) State per capita personal or disposable income
- 15) State workforce needs
- 16) Other cost of living indices

According to the Art & Science Group, LLP, Market Intelligence for Higher Education and the Non-Profit Sector, there are several questions that need to be addressed when considering the issue of pricing (<http://www.artsci.com/consultingpricepost.htm>):

- What are the enrollment consequences of various price points in terms of the quality, size, and composition of the applicant and matriculant pools? How can the impact of a price increase on particular groups of interest (such as underrepresented minorities) be managed?
- What is the magnitude of the net revenue gains that can be realized at various price points, taking into account necessary investments in increased financial aid?
- How can a major price increase best be justified or explained to make it more palatable to legislators, prospective students, parents, and the general public? What kinds of academic, co-curricular, or other enhancements might override negative price effects?

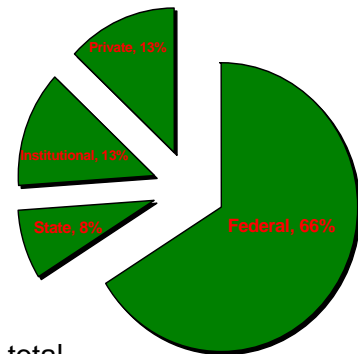
- What are the potential political repercussions and effect on public opinion resulting from major price increases, and how can they be managed?

Overall, it is suggested that NSU monitor the following on an ongoing basis: legislation, financial aid trends, consumer-driven decision making, and competition. This, as the overall management of campus enrollment, is not the responsibility of one department. The Office of Planning and Budget, Finance and Business, University Advancement, the Board of Visitors, and Enrollment Management must collaborate with regard to discussion, planning, and action in terms of pricing strategies and determining optimal pricing. A delicate balance must be maintained. A means of achieving this necessary collaboration exists in the form of the Revenue and Fees standing budget committee. The participants of this committee must be continually educated on University goals, operating costs, the changing landscape of student demographic data, student family income and changes (or the absence of change) in student aid packages. This committee must discuss the aforementioned questions and draw from the wealth of information and resources necessary to make these vital decisions. By undertaking this thorough initiative, NSU can expect to gain access to and utilize the most up-to-date information to be used in determining pricing strategies.

XIII. Financial Aid & Leveraging

Financial aid is the vehicle to promote access and attainment of higher education. The importance of financial aid resources, policies and modifications continue to be the most notable subjects of discussion in higher education. NSU processes more than \$40 million in financial aid. Eighty-two percent (82%) of NSU undergraduate students are highly dependent upon some form of financial aid. There are several notable facts that should be highlighted in the context of understanding financial aid.

Fact 1- Nationally, the average four-year institution provides 48% of the students with financial aid. The 82% served by NSU places the institution extremely dependent on financial aid resources. This is particularly evident in the 66% of students relying on some form of federal aid. Changes to Pell Grants, TRIO, student qualifications for aid, repayment policies, federal loan policies and a host of other alternations can greatly impact the ability to reach 8,000 students by 2010.



Fact 2 - Forty-five percent of all need-based undergraduates have a total family combined annual income of less than \$30,000 {Mean income is \$30,452 for NSU contrasted with \$33,671 for Virginia – a 10% gap from the average in the state}. **Another 45%** of all need-based undergraduate parents are not able to contribute any funds toward a students' education.

Fact 3 - Approximately 50% of the students rely on loans to fund their education. The average debt burden for undergraduates is \$15,042. The national average is \$15,375.

These facts assist with understanding the financial challenges many of the current students face. To meet those challenges, NSU must actively examine and modify current practices in awarding financial aid as it increases the amount of aid available to students through every avenue. Actions will be taken during 2005-2006 to closely examine the level of leveraging actually available to students and how those resources have been used in the past. By 2007, a leveraging plan will be required to address the best strategies to utilize limited resources.

At the center of any viable financial aid program is the availability of scholarships. The current seven percent (7%) of all aid must be increased to attract high performing students, provide access to low-income students and support retention efforts that will minimize, if not reduce the amount of time students are required to work in order to graduate. Peer analysis can be conducted to support an appropriate benchmark. Scholarship goals should be established by assessing the gap between the actual award and what a student can reasonably expect to pay given the profile.

Tuition Discounting

Given the factors considered in pricing strategies, Norfolk State University should develop policies to discount prices for some populations unwilling or unable to pay the current rates charged. Financial aid leveraging, a form of preferential packaging, utilizes financial aid as a marketing tool to recruit and enroll based upon students' estimated likeliness to enroll. Whether formally called tuition discounting or some other term, leveraging is a strategy utilized by all types of institutions, private and public. In a survey conducted in fall 2004 by Ruffalo CODY, enrollment managers from 1,773 colleges reported using some type of leveraging method. More than 47% used a financial aid leveraging tool developed internally, 22.4% cited the use of a leveraging tool from an outside vendor or consultant, and 29.9% indicated they did not use any financial aid leveraging tool (www.ruffalocody.com). The practice of "tuition discounting," a method used in financial aid leveraging that reduces the cost of attendance for individual students by replacing a portion of tuition with funded and unfunded student aid, requires a disciplined use of data to ensure the integrity and completeness of admissions and financial aid records. To effectively determine discounting the following trends must be monitored and categorized for in-state and out-of-state students:

- Inquiry and application patterns
- Yield on recipients offered only merit aid
- Yield by students awarded aid, those not given aid, and those who did not apply for aid
- Yield by academic programs
- Yield by minority and majority students
- Yield by need level
- And re-enrollment by students with high need, middle need, and low need (2004)

In order to assess the effectiveness of leveraging programs, it is imperative to know exactly what students have paid to purchase (i.e. the net cost to the consumer after discounts), which determines the actual net revenue, minus discounts given to each segment of the student populations (low need, low quality; low need, high quality; high need, high quality; and high need, low quality). There must be an acceptable balance between funding students who can pay with those that cannot. Determining the tuition discount rate that is optimal for NSU is a process that will involve in-depth analysis. Coordination of this program is essential from admissions and financial aid to academic departments/schools and athletics that award grants and other types of assistance based upon performance.

According to the Lumina Foundation report *Unintended Consequences of Tuition Discounting*, tuition discounting does not always produce the desired enrollment effects and increase institutional revenue. Without fully evaluating strategies prior to implementation, institutions may risk the following: limiting opportunities for low-income students by awarding financial aid resources to attract students whose families can afford higher tuitions; focusing on merit-based aid causing lower income students to bear a greater share of the tuition burden through increased borrowing, working longer hours, and making additional sacrifices to meet the increased charges; and losing focus of the net tuition revenue by funding needed student grants and scholarships from tuition and fees collected from other students.

NSU will not adopt a “copycat syndrome” and simply recreate the practices of neighboring institutions. A combination of factoring need, merit, and entitlement funds, total awards should also include how an admitted student is likely to respond to the price tag. Weighing these risks along with the limited current flexibility will control the degree to which discounting can be explored in the short-run. However to prepare for future growth initiatives, this method of financial aid packaging must be explored. An external company providing these services may be a most cost-effective method to address tuition discounting.

Determining the aid gap

The National Student Aid Advisory Panel has drawn attention to the important issue of unmet need. Unmet need represents the amount of need remaining after estimated family contribution, gift aid and self-help are subtracted from cost of attendance (www.schev.edu/Students/financialAidDrfinitions.asp?from=k12). High levels of unmet need exist among the nation’s needy students (Hart 2005). Ohio State pilot work on financial aid packaging for better retention of students with the highest need (\$0-\$1,500) confirms that needy students are the most vulnerable to unmet need. It was determined, however, that a low level of unmet need does make a difference. NSU must determine the optimal dollar threshold for incoming freshmen and monitor the unmet need of students’ matriculation to graduation. Other reasons for lack of persistence pertaining to financial aid, as reflected in the OSU study, included incomplete financial aid files and application past the priority deadlines (2005). To combat and reduce these occurrences, additional information and intervention are needed to support retention goals. An important conclusion from this study was that the use of data, as stated earlier, is important when looking at developing a leveraging program with both existing and potentially new resources.

Educating various publics

In a report released by the American Council on Education entitled “*Missed Opportunities: Students Who Do Not Apply for Financial Aid,*” about one-third of all full-time students did not complete the Free Application for Federal Student Aid (FAFSA). Even more disturbing is that an estimated 1.7 million undergraduates whose families were in the two lowest income brackets failed to complete the form. Approximately 850,000 students who did not complete the form would have qualified for at least a Pell Grant. These are missed opportunities to increase the population of students in the educational pipeline. The national publication entitled *8 Steps to Help Black Families Pay for College* provides the basis to which NSU will aggressively increase communication earlier with students and expand services to reflect financial aid planning. Some of those principles include providing knowledge, understanding and weighing debt, preparing a plan with long- and short-term strategies, understanding financial aid offers and college cost and finally understanding repayment obligations.

For the minor, parents must be educated on the financial aid process, grants, loans, payment plans and expected family contributions. Developing an understanding about financing a college education should occur before applying for admission. However, as the challenges of first generation college students continue to expand, NSU will at the very least work diligently to develop strategies to educate parents at the prospect stage. Early intervention, particularly with low-income families is also important. Many low-income families need solid information, guidance and an accurate assessment of all the charges they can expect to incur. To begin this early intervention, promoting community workshops that could potentially involve parents of middle school through college age students would be beneficial. Efforts to connect with families of all income levels should be conducted very early encouraging applications prior to the posted deadlines, as well as stressing the importance of filing important documents such as the FAFSA and verifying paperwork. Outreach efforts, prior to orientation or admissions visits, to places

such as churches, libraries and high schools can reach students and families at critical times when they are making decisions about college enrollment. It is suggested that best practices employed by successful institutions be researched and best fit practices implemented.

Increasing Aid

Narrowing the unmet need gap and improving the student profile are principles to shape the financial aid leveraging practices. As state and federal aid fail to keep pace with the cost of higher education, the aid gap continues to widen. To meet the needs of students and achieve each of the **THREE Rs**, it is essential to increase the amount of institutional grants and scholarships available. In order to “spread the wealth,” expand the benefits, and attract a more diverse class of students, additional resources must be secured. University Advancement has launched its first major gifts campaign to assist with scholarships. These funds are necessary to keep pace with competitors that are providing lucrative packages to students. Endowment resources are increasing but cannot support the scholarships required. \$180,000 can close the financial aid gap on one-third of the freshmen. Enrollment Management efforts will provide data to assist University Advancement with the usage and effectiveness of scholarship dollars. This feedback will become standard in an attempt to provide information to donors as well as assess the impact of those scarce resources.

The guiding principle for all recruitment efforts must be the understanding that NSU enrolls students that have the potential for success through graduation. Available funds should be aligned with the institutional mission and strategically distributed to both graduating seniors who are on track to achieving the mission within the six years if they began as freshmen as well as supporting those that enter as freshmen. Front loading financial aid packaging without planning for sustained levels of funding is counterproductive to strategic goals. The goal for students and the institution should be short- and long-term planning. Scholarship packages regardless of how small should be sustainable if students continue to meet the particular requirements. According to the article *Assessing the Impact of Financial Aid on Enrollment*, some questions to ask when exploring this issue may include (Hart 2005):

- What do the current financial aid packaging strategies contribute to enrollment of students who are the subject of institutional goals?
- How do financial aid packaging policies influence year-to-year retention?
- What types and amounts of aid lead to timely graduation?
- Are there students who NSU would like to enroll who never apply because they perceive they cannot afford the costs?
- Are there students enrolled currently who are eligible for aid and who have not applied?
 - Are myths about financial aid and financing delaying students' progress
 - Are levels of debt outside student loans negatively influencing enrollment goals?
 - Are students who do not attend the institution or who withdraw citing financial reasons ?

By developing financial plans and matrices to examine trends, developing financial aid outreach and planning initiatives for prospective and current students/parents, and promoting and implementing excellent service orientation and cross training, in accordance with the institutional mission and the goal of recruiting and retaining a successful class of students, NSU will have success in improving the utilization of financial aid as a recruitment and retention tool.

Administrative Operations

The functions provided by the Financial Aid and the Bursar are important to student retention and critical toward positive customer service perceptions. Not unlike other institutions, the financial aid experience has been a negative one for too many students. This is a perception that can be dispelled. NSU can further distinguish itself by aggressively addressing the needs of its student population.

During the 2003-04 academic year, the Financial Aid Office received and processed more than 15,000 applications. The recipient yield was slightly more than 42%. Benchmarking data on an acceptable yield rate currently does not exist but will be determined as a component of this plan. Factors that may contribute to this yield might include unmet need, delayed processing time, dates students receive award letters, human error. There may be other factors contributing to the yield that are ancillary to the financial aid process. By gathering data from students and utilizing the available data to answer questions, appropriate strategy development can be incorporated.

Previous references have been made to the need for data, improving business processes and improving the use of available technologies to reduce manual intervention and error rates. Financial aid is a tedious and meticulous discipline. Automation at the highest level possible must be included in process reengineering. The volume of applications, student or parent errors and the actual continuous handling of one student's paperwork is a labor intensive process. Examining and reorganizing functional units and empowering these units to provide alternative process flows has the potential to increase productivity. Recommendations from an external agency contracted to examine financial aid practices will be incorporated. The key components of the findings include training, automation, obsolete processes, team building, additional staffing needs, morale and compensation. The PERFORM model will be beneficial to improving customer service concerns related to Financial Aid.

An extensive review of loan administration practices will be conducted. The review will include Management of Direct Loans, alternative loans, packaging processing the human capital required to administer loans, use of the technology and overall efficiency. There are viable alternatives that may provide economies of scale related to administering several aspects of financial aid programs. Any recommendations will be appropriate to the population of students, well planned and justifiable.

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Appendices

Matrices for school enrollment targets

Increasing Hispanic Student Retention and Graduation Rates

Pricing Strategies, Financial Aid Leveraging, and Assessment of Key Performance Indicators