

A silhouette of a superhero figure stands on a reflective surface, looking upwards. The background is a deep blue with white stars and a bright light source on the right. The superhero's cape is flowing behind them.

Enrollment Initiatives & Collaboration

Presenters:

Jason Cronk, University of Pennsylvania

Dwight Horsey, Millersville University

Liz Rihl Lewinsky, St. Joseph's University

Rebecca Schreiber-Reis, Penn State University

Lori Williams, Northampton Community College

We Are All Super Heroes

2019 PASFAA Spring Training



GRADUATE SCHOOL IS EXPENSIVE, TAKES HARD WORK... AND MAY CHANGE YOUR LIFE

JASON CRONK
SR. ASSOCIATE DIRECTOR OF ADMISSIONS
THE UNIVERSITY OF PENNSYLVANIA
GRADUATE SCHOOL OF EDUCATION
CRONK@UPENN.EDU

USING FINANCIAL AID COMMUNICATIONS TO CONVEY VALUE

- Authenticity is compelling
- Candor leads to better conversations
- You are not the right school for everybody
 - But are probably the single best choice for somebody



Leverage Financial Aid To Boost Conversions

- ❑ Knowledge can overcome objections to cost
- ❑ Segment pool by SES, quality & affinity to assign scholarship
- ❑ No separate application for scholarship
- ❑ Supplemental Scholarships at faculty/ program manager discretion



Getting Students to Listen on SM

- Are you saying what you think you're saying?
 - A series of unfortunate posts
 - If you don't *understand* them, they will not *hear* you



Is Collaboration Overrated?

- Collaboration is not:
 - Being Nice & Keeping Everyone Happy
 - Having Meetings
 - Doing Other People's Jobs or Letting Someone Else Do Yours
- Collaboration Requires:
 - Humility
 - Courageous Conversations
 - Seeing the Big Picture
 - Sponsorship



Enrollment Initiatives & Collaboration

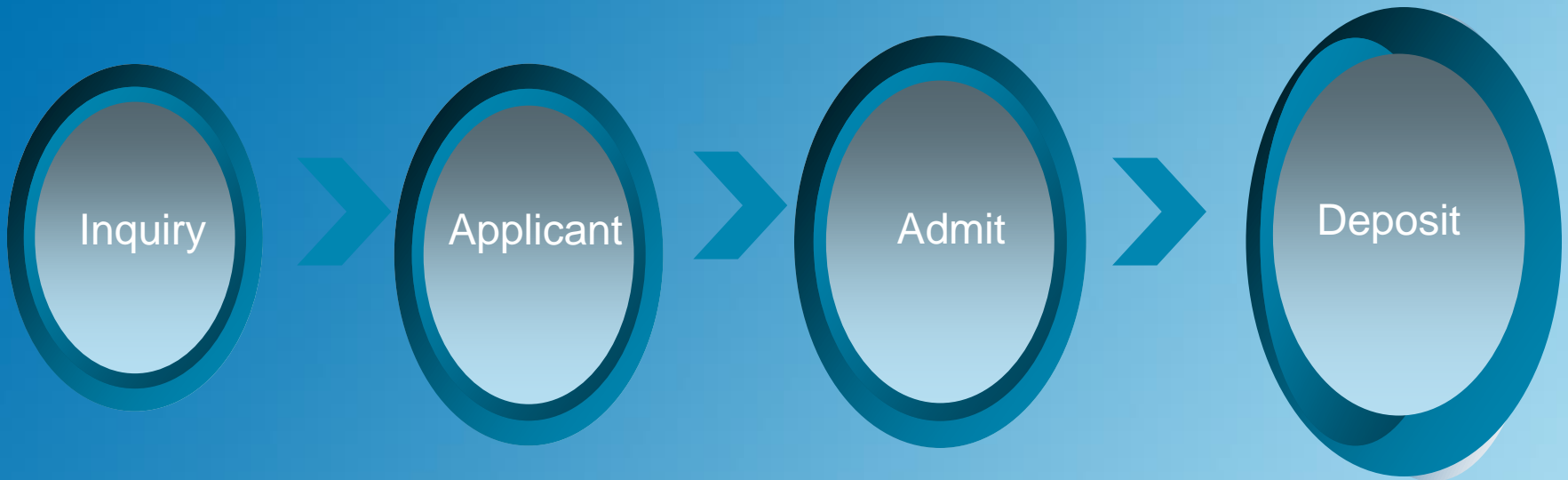


Elizabeth Rihl Lewinsky
Director of Financial Aid
Saint Joseph's University

We Are All Super Heroes

2019 PASFAA Spring Training

Admissions Funnel



We Are All Super Heroes
2019 PASFAA Spring Training



Prospective Student Financial Aid Communication Plan

Inquiry Stage

- Affordability messaging
- Advertise NPC (if your NPC user yield is positive!)
- Promote merit scholarship opportunities
- Key statistics (% receiving aid/total \$ amounts)
- Messaging on what makes your institution's financial aid program distinctive (i.e.-'value-added' services such as: creating a 4-year financial plan, financial literacy programming).

GOAL: Drive to apply for admission!



We Are All Super Heroes
2019 PASFAA Spring Training

The Prospective Student Financial Aid Communication Plan

Applicant Stage

- Communicate financial aid application process
- Communicate key deadlines
- Advertise any 'special' scholarships that require separate applications
- Share how to research outside scholarship opportunities
- Weave ROI messaging into your communication

GOAL: Drive to file FAFSA and list your school code!



We Are All Super Heroes
2019 PASFAA Spring Training

The Prospective Student Financial Aid Communication Plan

Admit/Accept Stage

- Educate on available financing options (Payment plans, PLUS and alternative loans).
- Outside scholarships (treatment/student sends award notice to Financial Aid)
- Communicate new tuition costs
- Communicate how to deposit/benefits of early deposit
- Provide specific financial aid counselor contact info.
- Offer assistance reviewing aid package

GOAL: Drive to Deposit!

We Are All Super Heroes
2019 PASFAA Spring Training



The Prospective Student Financial Aid Communication Plan

Deposit Stage

- How to apply for available financing options (Payment plans, PLUS and alternative loans)
- Notify students selected for federal verification
- Communicate billing timeline
- Advertise Financial Aid Office's services for new student orientation
- Continue to weave ROI messaging into communication

GOAL: Anti-Melt!

We Are All Super Heroes
2019 PASFAA Spring Training





We Are All Super Heroes
2019 PASFAA Spring Training



Utilizing Financial Aid to Increase Enrollment

- Planning Phase:
 - Review merit award levels (are award amounts/academic criteria in line with your primary competitors? Collect competitor offers.)
 - Review packaging formulas and formula for administering need-based aid. Does it align with your institutional priority? (i.e.-if increasing academic selectivity and enrollment are primary goals, are you meeting greatest amount of institutional need for academically strongest?)

We Are All Super Heroes
2019 PASFAA Spring Training



Utilizing Financial Aid to Increase Enrollment

- Analyze historical data: What academic cells (i.e.- SAT/ACT bands, GPA's)/income and/or need levels do you yield the worst with? Look at your “gap” ranges, geography, majors, etc. What categories do you yield the best with/the worst with? Use this information to inform your packaging formulas.
- Leverage need-based aid to target your sweet spot.
- Use prior year data to run simulations (i.e.-if you increase your merit levels or % of need met by xx amount, what would your yield and TDR look like?)

We Are All Super Heroes

2019 PASFAA Spring Training



Utilizing Financial Aid to Increase Enrollment

- Working backwards can help. What's target TDR (tuition discount rate) and enrollment goal (FR/TR)?
- Partner with Admissions in these conversations.
- Establish your financial aid awarding "PLAN" and if you consider appeals, allocate funding for that in your financial aid budget.
- Appeals: Review in conjunction with Admissions. Use these \$'s to "shape" the class (i.e.-academic profile, diversity, major, gender, etc.)
- Set clear parameters: PJ only or PJ+Appeal?



We Are All Super Heroes
2019 PASFAA Spring Training

Using Social Media to Contact Students

- Partner with Admissions to post to admitted student/deposited student channels (FB groups, Twitter, Instagram, etc.)
- Consider “virtual” information sessions
- Give specific content for financial aid posts (i.e.-drive to file FAFSA, review aid package, explore financing options, etc.)
- Once enrolled, establish separate “enrolled” student channels for financial aid.



We Are All Super Heroes
2019 PASFAA Spring Training

Using Social Media to Contact Students

- Develop monthly calendar of posts (ex: May: how to accept aid, advertise payment plan opening, how to complete MPN/EC, opting out of health insurance. June: share billing cycle, how to apply for alt/PLUS loans, etc. July: How to apply for FWS jobs.)
- Build membership
- Cross-post: Outreach to other campus FB groups to share your posts/reciprocate!



We Are All Super Heroes
2019 PASFAA Spring Training

Collaborate Between Offices

- Identify your key campus “partner” offices:
 - Student Accounts/Bursar
 - Registrar
 - Admissions
 - One-Stop Shop
 - Student Success Center
 - Academic Advising
 - Veteran Services
 - Housing/Residence Life
 - Career Development
- Establish regular meeting schedule between the “key” areas



We Are All Super Heroes
2019 PASFAA Spring Training

Collaborate Between Offices

- Clear lines of communication are critical!
 - Schedule meetings at regular intervals between leadership and among staff from all areas if appropriate
 - Share updates with your own team.
- Provide critical financial aid updates with other areas.
Examples: key deadlines, legislative changes, policy/procedural changes, etc.
- Avoid “communication inundation”!
- Keep the “big” initiatives front and center and discuss how your offices can work more efficiently toward achieving them:
- 1. New Student Enrollment 2) Retention (example: pre-registration outreach 3) New Student Check-in 4) Graduation

We Are All Super Heroes
2019 PASFAA Spring Training



Collaboration Between Offices

- Seek out opportunities to support other departments' initiatives.
- Share costs when possible to reduce budget impact. (ex.-publications, training, technology)
- Explore how technology initiatives can be cross-departmental. (ex.-ticketing system, secure document upload process)



We Are All Super Heroes
2019 PASFAA Spring Training



Enrollment Initiatives & Collaboration

Rebecca Schreiber-Reis,
Director of Admissions &
Financial Aid
Penn State's Dickinson Law

We Are All Super Heroes

2019 PASFAA Spring Training

Refunds
& Balances Due

Admission Decisions
& Merit Awards

Need-Based Aid
& Loans

Director of Admissions & Financial Aid

Federal Work
Study

Endowed
& Special
Awards

We Are All Super Heroes
2019 PASFAA Spring Training



Competitive Offer

- Merit based on holistic application review.
- Reserve part of budget for need-based aid.

Consider Appeals

- Law school enrollment = students' market.
- Review awards from other schools.
- Create COA comparison.

Cost Education

- Take time to explain *net cost*.
- Provide personalized assistance with budget planning.



We Are All Super Heroes

2019 PASFAA Spring Training

Goal: Applicant to Matriculant

Coordinated Communication
Efforts

Template
Email
Stream

Text
Messages

Social
Media

Highly
Personalized
Connections



We Are All Super Heroes
2019 PASFAA Spring Training

Email Stream

- Effort led by Communications.
- First contact with Financial Aid – be thoughtful & deliberate with language.
- Invite further conversation.



Dear Abby,

The thought of paying for a legal education is often a source of anxiety for prospective students. Paying tuition, fees, books, and living expenses completely out-of-pocket is rarely feasible. Some individuals prefer to close their eyes, sign loan documents, and hope for the best, but the stress of financing an education can push others to walk away from their dream of becoming a lawyer without looking at the real financial picture.

In my years as a financial aid administrator and as a former financial aid recipient myself, I understand that navigating options to [finance your education](#) can seem overwhelming. I can help you apply for need-based grant aid, identify [outside scholarships](#), and know your student

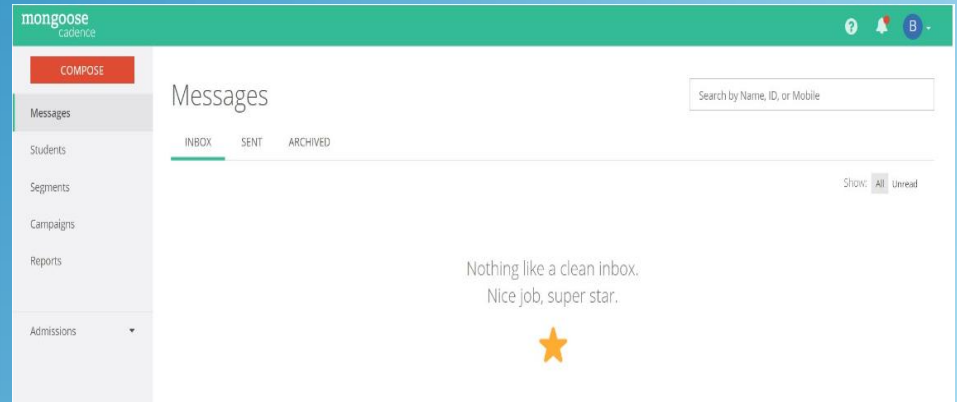
We Are All Super Heroes

2019 PASFAA Spring Training



Text Nudging

- Advise applicant of upcoming deadlines
- Increase engagement with staff
 - Build relationships
 - Gauge interest
- Invitations to events feel more personal



- Offer assistance and answer questions



We Are All Super Heroes
2019 PASFAA Spring Training

Social Media Success

Active Listening

Strategic Engagement



Information Sharing

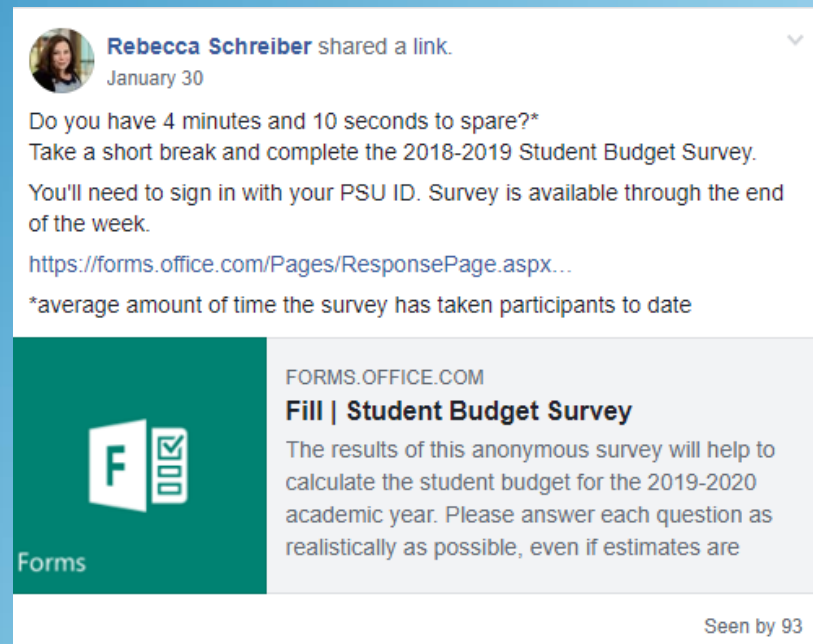


We Are All Super Heroes
2019 PASFAA Spring Training



Posted on the Admitted Student page

Facebook Groups by Class Year



Posted on all Current Student pages

We Are All Super Heroes

2019 PASFAA Spring Training





We Are All Super Heroes
2019 PASFAA Spring Training



Director of Admissions &
Financial Aid: **Must work well
with others!**



We Are All Super Heroes
2019 PASFAA Spring Training



A silhouette of a superhero figure stands on the left side of the image, facing right with hands on hips. The figure is set against a blue background with a starry, night-sky effect. A bright light source from the right creates a glow and a shadow of the figure on the ground.

Enrollment Initiatives & Collaboration

Lorraine Williams
Assistant Director of Financial
Aid
Northampton Community
College

We Are All Super Heroes

2019 PASFAA Spring Training

Northampton Community College: Communication Plan to students from application to enrollment 1 of 1

THE
COMMUNICATION
PLAN



SHAREABLE



EXPANDABLE



TRACKABLE



We Are All Super Heroes
2019 PASFAA Spring Training

Northampton Community College: Utilizing FA as tool to increase enrollment

1 of 1

Strategize

Leveraging is less of a strategy at the community college level based on the resources available.

Increasing enrollment at an open enrollment school relies on increasing communication of the message that financial aid is **available** and **accessible**.

Communicate

Share information, trends and data to support the recruitment efforts of the institution.

As an institution **DON'T** send mixed messages to students.

Advocate for financial aid to have a seat at the table where institutional goals are developed.

Collaborate

Be willing to go beyond "the way it has always been done".

Deadlines and policies need to work for all departments with a part in the enrollment process in order for them to work for students and families.

Ex: Lead reports are generated from financial aid to admissions whenever students list NCC on their FAFSA but have not applied for admission



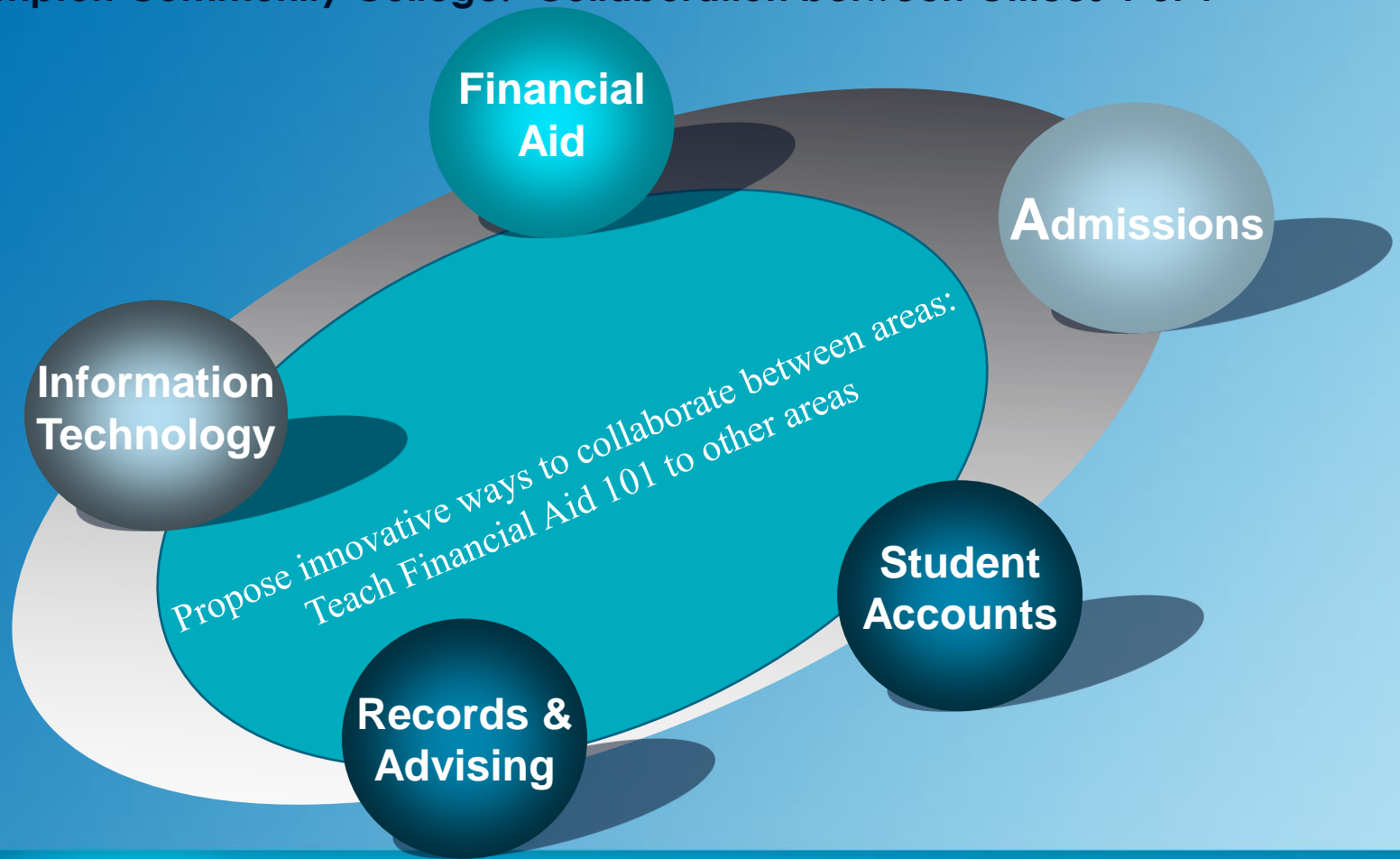


Use caution with FERPA-sensitive information!

Coordinate/piggyback messages with other areas so students are not overwhelmed

We Are All Super Heroes
2019 PASFAA Spring Training





We Are All Super Heroes
2019 PASFAA Spring Training





THANK YOU !

We Are All Super Heroes
2019 PASFAA Spring Training