Goal 1: Operating Margin: Achieve an operating margin of more than zero (0%) as measured by audited financial results for the fiscal year.

- Eliminate the structural deficit: Reduce expenditures via the execution of a Voluntary Separation Incentive Program, a 3% cut to all division budgets, strategic re-organizations across administrative units, careful alignment of NTT faculty resources with high-need instructional areas, and other strategic cost savings measures.

- Grow revenue to support fiscal stability: Grow revenue through strategic initiatives such as international programming, online program growth, optimization of per student net revenue, and other initiatives.

- Plan for a 2% margin: Establish plans to move beyond a 0% margin towards the system goal of 2% margin by FY22. This includes deploying instructional resources to achieve a 17:1 student: faculty IPEDS ratio. It also necessitates achieving additional administrative efficiencies, including savings from the shared services initiative and aligning the campus academic structure (see goal #6).

- Engage Ruffalo Noel Levitz (RNL) in a review of undergraduate need-based and merit based aid and implement recommended strategies with the aim of maximizing both undergraduate enrollment but also net revenue.

Enrollment Management has engaged RNL in a comprehensive analysis of fall 2018 and fall 2019 admitted undergraduate students. This review included:

- Development of reports from multiple departments within Enrollment Management.
- Two-day on-campus review of areas of success and opportunities for improving yield and net tuition revenue. This engagement included participation from Administration and Finance and the Chancellor’s Office.
- Ongoing conversations seeking clarification and additional analysis of specific opportunities for savings and/or return on investment.

RNL presented multiple proposals for consideration to Enrollment Management and executive leadership. The proposals were carefully considered by these groups and the following have been selected for implementation:

- Improve the presentation of the New England Regional Tuition discount. This will now be presented as a direct tuition credit deducted from the posted Out of State tuition rate. It will also be presented to families at the time of admissions increasing the perceived amount of institutional gift aid. This approach compliments other work the division has been engaged in to increase our outreach and marketing to out-of-state markets. There is no additional cost to implementing this recommendation.

- Increase Beacon Merit Scholarships to Out of State students from $4,000 to $5,000. This is expected to yield an additional 19 students with a total net revenue gain of $312,474.

- Increase Beacon Merit Scholarship to New England Regional students from $3,000 to $4,000. This is expected to yield an additional 10 students with a total net revenue gain of $164,446.

- Increase Beacon Merit Scholarships to In State students who do not receive a Boston City Scholarship from $3,000 to $4,000. This is expected to yield an additional 45 students with a total net revenue gain of $493,020.

- Award $2,000 Beacon Merit Scholarships to all students with a recalculated high school GPA between 3.3 - 3.39. This is expected to yield an additional 41 students with a total net revenue gain of $384,293.

The engagement with RNL has also improved our cross-divisional understanding of the interplay between merit-based and need-based budgets and net tuition.
### AY2019-2020 GOALS
#### MID-YEAR REPORT
#### EXECUTIVE AREA: ENROLLMENT MANAGEMENT

Enrollment Management continues to work with RNL to identify additional areas of opportunity for reducing overall financial assistance budgets and maximizing net revenue, understanding student clearinghouse data and reviewing opportunities in other markets. Additionally, a weekly call is in place to track our progress on the new proposals throughout the fall 2020 cycle.

| Goal 2: Student success: Improve student success including increased retention, graduation, and career attainment rates. | • Promote supportive and engaging student experience: Deepen our programs in student life, focusing attention both on the residence hall community and the commuter population so that integration and belonging characterize both. Continue to grow an experience reflecting 24/7 student needs including safety, successful operation of residence halls, leadership and community engagement, learning communities, student employment, athletics, and other activities. | • Improve undergraduate advising: Continue our advising enhancement initiative. This includes a focus on equitable distribution of advising resources as well as deepening the use of common tools, metrics, and practices. | • Execute retention campaigns using early warning predictors, supported by analysis and technology tools: Extend and deepen use of predictive analytics, early alert campaign and use of CRM technology to support advising case management. Use data to identify and target barriers to student success, including common reasons for transfer or withdrawal. | • Remove barriers to student progression: Continue to remove course bottlenecks and improve DFW rates in gateway courses (particularly in math), streamline the registration process, and provide emergency and other supports. | • Contribute to continuing student registration campaigns and improve the student experience by removing administrative barriers and implementing student success initiatives. | Enrollment Management continues to take the leadership role on the Triage Committee. The Triage Committee has taken the following actions to improve student success and reduce administrative barriers:

- Expanded membership in order to apply the proven methods of reducing administrative barriers to other areas of the university. For example, the inclusion of members of the Dean of Students office has helped leverage available technology for outreach efforts to holds for Wellness Education.
- Coordinated with the University Advising Center, represented on the committee, on two specific registration pushes between the fall and spring semesters. The first event is a decentralized advising day in which students will receive additional messaging to visit their respective advisors. The second will be a comprehensive drop-in advising event that will also include access to individuals who can facilitate the removal of administrative holds.
- Developed reports and weekly-distribution of information related to student holds that prevent registration. These reports delineate residential and non-residential students and allow the committee to track progress on individual administrative holds. This will serve as a basis for year-over-year reporting in future registration cycles.
- Developed a single page on the UMB website (umb.edu/registrar/holds) which describes holds and required actions for the most common registration blocking holds.
- Created an administrative and deadline calendar which compliments the University’s Academic Calendar. This calendar can be downloaded to a student’s phone and will provide reminders about important deadlines including withdrawal dates, billing due dates and pass/fail dates. |
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<tr>
<th>Goal 4: Enrollment: Increase enrollment and net tuition revenue, with a focus on predictive and accurate models and proven best practices.</th>
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<tr>
<td><strong>Increase new undergraduate enrollment:</strong> Optimize financial aid and merit scholarship strategies to strengthen yield and net revenue. Execute multi-channel marketing and communication strategy targeting applicants and committed students. Improve campus visit experience. Embed an enrollment counselor at Bunker Hill to support transfer student pathways. Expand veteran student interest and services.</td>
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<tr>
<td><strong>Maximize continuing undergraduate enrollment:</strong> Execute visible and sustained registration campaigns to remove holds and reduce barriers to student progression.</td>
</tr>
<tr>
<td><strong>Focus on improving net tuition revenue:</strong> Engage with industry experts to analyze financial aid and discounting practices, in order to develop strategies to increase overall and per student net tuition revenue.</td>
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<tr>
<th>Attract a greater number of prospective visitors at each stage in the admissions pipeline and improve the experience visitors have through a revised tour and information session, new campus visit piece and additional training of admissions staff and campus tour guides.</th>
</tr>
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<tbody>
<tr>
<td>A review of our visit program in July provided an opportunity to make some changes to our daily tour and information session program including:</td>
</tr>
<tr>
<td>- Moving the location from a windowless room in the Campus Center, to a larger and brighter space in the Integrated Sciences Complex. This space accommodates more guests and is closer to the new parking garage making it easier for our guests to navigate campus.</td>
</tr>
<tr>
<td>- All the admissions counselors participated in a public speaking training to gain tips on delivering content in a compelling way, creating a positive environment and tapping into an authentic voice.</td>
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<tr>
<td>- A new, shortened tour guide route was introduced and it was accompanied by a tour guide training manual for our Beacon Ambassadors and check-in protocol. The tour route was adjusted to better showcase the campus and to abbreviate the walking time.</td>
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<tr>
<td>Refreshments were adding to the information session space to create a more...</td>
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- **Increase new graduate enrollment**: Achieve growth in revenue-producing graduate programs through streamlined application processing, targeted digital marketing, and deep collaboration with program faculty.

- **Sustain out-of-state enrollment and diversify international enrollment**: Strengthen and deepen partnerships with international recruitment partners. Boost international visibility of UMB (especially in Latin America, Africa, and areas of Asia other than China, where we already have a footprint) in collaboration with Navitas. Launch innovative new partnerships with Shorlight (especially in Computer Science and in undergraduate programs for students remaining in home countries and attending over the Shorlight Live platform). Improve and sustain out-of-state recruitment and marketing and host admitted student receptions.

  students interested in transferring from BHCC to UMass Boston.

  - Create dashboards that overlay admissions data with financial aid and campus visit data to have more predictive indicators of enrollment prior to May 1 deposit deadline. Disseminate admissions data to campus leadership on a regular schedule.

  - Expand the number of enrolled undergraduate Veteran students by 5% and better align the resources provided to our continuing student Veterans.

  welcoming environment

- A brand new campus visit piece was created, the first time we have a piece dedicated to campus tour and information sessions. It reinforces some of the messages we want students to reflect on when they leave campus: our proximity to Boston, our diverse community and the exceptional value a UMass Boston education provides.

To assist with the check-in process, event communications and event surveys, we implemented a new event registration platform. A goal of using the platform was to better collect survey data using a mobile-friendly, post-event survey and utilize that information to enhance the visit experience.

The platform shows that the changes we implemented over the course of the fall semester have resulted in a marked improvement in visitor experience. Two questions help capture the experience of visitors and both have shown positive increases when you compare responses from July-September to those garnered between October and December:

<table>
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<tr>
<th>What was your impression of our school</th>
<th>July - Sept</th>
<th>Oct - Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not my style</td>
<td>4.98%</td>
<td>4%</td>
</tr>
<tr>
<td>It’s OK</td>
<td>29.34%</td>
<td>21.65%</td>
</tr>
<tr>
<td>Loved it</td>
<td>65.68%</td>
<td>74.35%</td>
</tr>
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<tr>
<th>How helpful were the students/staff that led your visit?</th>
<th>July - Sept</th>
<th>Oct - Dec</th>
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<tbody>
<tr>
<td>Not helpful</td>
<td>4.68%</td>
<td>2.14%</td>
</tr>
<tr>
<td>Sort of helpful</td>
<td>20.22%</td>
<td>10.95%</td>
</tr>
<tr>
<td>Very helpful</td>
<td>75.09%</td>
<td>86.90%</td>
</tr>
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In addition to enhancements in the tour and information session we also introduced two new summer programs. For the first time this July and August we offered 2 large scale summer programs themed UMBlock Party. The visits attracted over 340 total prospective students and guests and included a campus tour, interactive information session and summer BBQ with seating inside and outside of the residence hall.
This cycle we have introduced additional digital marketing opportunities utilizing Facebook, Instagram and SnapChat. The ads are rolling out now and we hope they will impact attendance at our accepted student programs and our spring events.

Implement strategies to increase our awareness in out-of-state markets with the goal of generating more interest and ultimately increasing enrollment.

An attractive offering, the New England Regional Student Program (RSP), has not realized its full potential to attract out-of-state students to our campus. This program allows New England students to come to UMass Boston at a discounted rate that is less than out-of-state but above that of in-state. Many steps were taken this fall to better promote the program to qualified students including:

- New emailed communication highlighting the benefits
- New emailed communication to applicant’s parents that focused on value
- Update on RSP to New England guidance counselors
- Collaboration with Administration and Finance to set a compelling RSP rate for 2020-2021
- Work to update acceptance letters with verbiage that made the discount clearer and presented it to parents and students earlier in the decision-making process
- Collaborative work between Financial Aid and the Bursar’s Office to include tuition credit on bill

In an effort to bolster our out-of-state enrollment we have increased the number of visits Undergraduate Admissions conducted by 4% over fall 2019 (259 v. 269). We have been more strategic with our out-of-state travel and focused on 9 states: Connecticut, Florida, Illinois, Maine, New Hampshire, New Jersey, New York, RI, VT. The following states received the greatest increase in visits:

- 50% increase in CT travel
- 135% increase in FL
- 15% increase in RI
Early indicators show positive results from our out-of-state efforts. Fall 2020 out-of-state applications are up 4% and Early Action admits are up more than 41% over Fall 2019. The largest gains have been realized in New Jersey.

Additional, we have partnered with a marketing firm to be more precise with our messaging using digital marketing platforms including Facebook, Instagram and Snapchat. Tailored messages have been delivered to out-of-state students at the application and admit phase and direct students to audience specific landing pages.

### Goal 5: Online

**Provide significantly increased access to, and impact from, online education.** Increase revenues and continue to collaborate and cooperate with UMass Online.

- **Improve organizational focus:** Streamline management of online courses, appointing Dr. Mya Mangawang, a senior leader reporting directly to Provost – with a dotted line to the Chancellor - to lead the effort.
- **Build quality of online instruction:** Build faculty strength and supports for teaching online, including comprehensive wraparound services for new online instructors and for new course design and delivery. Institute measures to assure quality of online instruction.
- **Increase enrollment and revenue by 5%:** Execute a series of initiatives to increase enrollment, including (a) launch new online programs, in addition to focusing on existing programs and individual online courses, (b) build marketing, lead generation, and nurture capacities for online programs, (c) assess and strengthen online faculty and student supports, and (d) assess and strengthen online instructional design and delivery capabilities.
- **Re-introduce revenue sharing:** Re-introduce revenue sharing for growth of new and existing online programs, providing a clear incentive to departments for online

**Develop and execute a multi-audience, multi-channel marketing and communication strategy designed to position UMass Boston as the University of choice among prospective undergraduate students, their families, and other key influencers. The strategy will address each stage of the recruitment and enrollment funnel from purchased leads and inquiries to deposited students.**

For the 2019-2020 undergraduate recruitment cycle, Enrollment Management reexamined our prior communications and created a new marketing communications flow, beginning with our inquiry pool and concluding when the admitted student registers for classes.

At the center of our marketing work was developing new messaging and a content creation strategy that spoke to this generation as well as other stakeholders who play a critical role during the college admissions process. This resulted in new print publications, emails, social media strategies, videos, and digital advertising. We also engaged a higher education digital marketing firm to support our advertising efforts with digital marketing campaigns. Spark 451, a New York-based firm, came on board in September.

We further expanded our communication outreach to parents and guidance counselors and created a monthly UMBMoment newsletter to keep them informed of activities and accomplishments and remind them of upcoming deadlines. We have also segmented our “first time freshmen” audience and developed messaging targeted to them depending on how we acquired their
<table>
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<tr>
<th>Program growth.</th>
<th>Continue to collaborate and cooperate with UMass Online on the plans to support growth</th>
</tr>
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</table>

- Our new email communication flow has performed well, with an average open rate of 33.3 percent. The industry standard for email open rates is 25 percent. Our digital advertising efforts are also performing well. We used Instagram, Facebook, and Spotify to promote programs and events that included Freshman and Transfer Open Houses. These campaigns had close to 1.5 million impressions with a click through rate averaging 5 percent. The average click through rate for education is 2 percent.

- We also increased our social media outreach via Instagram with content that focused on the benefit of a UMass Boston education as told through our students. We intentionally posted photos of our students, facilities, and waterfront environment to showcase the beauty of our 120 acre campus surrounded by Boston. From July 1 2019 to January 1 2020, we have more than doubled our Instagram followers from 1,000 to 2,200. On a weekly basis about 1,500 Instagram users visit our account. We have an average engagement rate of 12.5 percent. The industry average is 4.7 percent.

- **Embed a Transfer Enrollment Counselor at Bunker Hill Community College solely to recruit and support students interested in transferring from BHCC to UMass Boston.**

  - Our new initiative to embed a counselor, Ashley Ewing, at Bunker Hill Community College in the fall got off to a slow start due to union and administration negotiations at the community college. After a few months Bunker Hill reached a decision and we were able to officially embed a counselor in late November.

  - Despite this timing setback many efforts were made to provide additional support and services to students from our top community college feeder:

    - New webpage created specifically for Bunker Hill students to introduce our counselor and promote the additional services we offer: [www.umb.edu/bhcc](http://www.umb.edu/bhcc)
    - New inquiry form created to capture Bunker Hill prospects so we can communicate about upcoming visits and deadlines
• More than 600 activities recorded by Ashley including emails, texts, and phone calls.
• Introduced Individual Appointments for BHCC students on October 2 using our VisitDays platform
  o 42 appointments were scheduled between October 2 and December 23.
• 11 visits were made to Bunker Hill between September 25 and December 17.

Spring 2020 inquiries, applications and admits are similar to spring 2019, however, we are up a bit in enrolled student from Bunker Hill. We believe these efforts will continue to pay dividends and be reflected in our end of year report.

Create dashboards that overlay admissions data with financial aid and campus visit data to have more predictive indicators of enrollment prior to May 1 deposit deadline. Disseminate admissions data to campus leadership on a regular schedule.

Two external consultants brought to light the need for more integrated admissions funnel data. Enrollment Management has recently created dashboards in our CRM that not only tracks our prospect, applicant, admit and deposited numbers but also provides visit data at each phase and where the student is in the financial aid process. The integration of all of this data provides a clearer picture of our applicant pool.

Finally, a survey was implemented that is sent to each student by text message immediately following their campus visit. The survey is 3 questions and gathers immediate feedback on the visitors experience with staff, impression of the school and whether the visit increased their likelihood to take the next step. Research has shown that the answer to the last question (likelihood to apply, likelihood to enroll) can be predictive of the student’s ultimate decision and provides an earlier
indicator than deposit data. Sixty-six percent of students who visited the campus between July and September indicated that they were more likely to take the next step which, depending on their phase in the admissions process, could be applying or enrolling. That percent has increased to 78% for visitors that came to campus between October and December, a 12% increase.

<table>
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<tr>
<th>Did the visit increase your interest in us?</th>
<th>July - Sept</th>
<th>Oct - Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’m less interested</td>
<td>12.97%</td>
<td>6.43%</td>
</tr>
<tr>
<td>I Feel the Same</td>
<td>20.49%</td>
<td>14.76%</td>
</tr>
<tr>
<td>I’m More Interested!</td>
<td>66.54%</td>
<td>78.81%</td>
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A concerted effort has been made this cycle to disseminate undergraduate admissions data on a monthly basis to a wide audience of campus leaders to keep the community informed of the progress we are making to reach our enrollment targets. The reports provide consistent information to Administration and Finance, Academic Affairs, the Chancellor’s Office and other key constituents.

Expand the number of enrolled undergraduate Veteran students by 5% and better align the resources provided to our continuing student Veterans.

Many efforts are underway to expand the presence and reach of the Veterans Center for Excellence and continue to grow our Veteran student population. Starting in August a steering committee was created with representation from Enrollment Management (Veteran Affairs), Student Affairs (Dean of Students Office), Academic Affairs (VPASS), the Joiner Center and the Student Veterans Center. This group has been working on several initiatives including:

- Focus groups of current Veterans to understand their experience and the services needed
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<th>• Expanding the availability of tutoring services for Veteran Students</th>
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<tr>
<td>In addition, for the first time at UMass Boston, we introduced a dedicated session for incoming Veterans at New Student Orientation. The session not only introduced our centers, departments and services, but also provided valuable information to Veterans about their military benefits and the academic policies required to maintain them.</td>
</tr>
<tr>
<td>Work is underway to launch a new Veterans Center for Excellence website that will showcase facts about our Veterans population, the departments who support them and the services we provide. This new site will launch in April and be used to support recruitment as well as continuing Veterans.</td>
</tr>
<tr>
<td>Spring 2020 applications show a slight increase over spring 2019. Decisions are still being reviewed and the orientation cycle for spring 2020 is just underway, but we are optimistic that we will see a slight increase in Veteran undergraduate enrollment. Work is already underway to generate more interest from this population for fall 2020. A dedicated Veteran recruiter is being hired and they will be tasked with visiting Veteran Centers at community colleges, attending military programs and connecting with Veteran Service Officers throughout Massachusetts. We have already created contact records for 100+ Veteran Service Officers so we can begin to communicate more regularly with them about upcoming events, deadlines and new programs.</td>
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