Alignment of Institutional Scholarships with Enrollment Goals

January 26, 2007
Presentation Overview

- Selected Strategic Enrollment Management (SEM) Principles
- Statement of Guiding Principle and Goals
- Institutional Aid Strategy
- Questions and Answers
• Selected SEM Principles
  – Commitment is required from entire campus community
  – Plan and Goals must be data driven
  – Use of aid must be recruitment and retention driven
• Selected SEM Principles
  – Use of aid must be coupled with a strong marketing plan to communicate our distinct advantages (recruitment)
  – Use of aid must be coupled with a focus on student success (retention)
  – Communications must be personalized, customized, frequent
  – Service must be seamless
• IUPUI is committed to the use of federal, state, institutional (campus and academic unit), and IU Foundation scholarship funds to recruit, enroll, and retain undergraduate students from diverse backgrounds.
  – (Note: The remainder of the presentation is focused on undergraduate students.)
Types of Aid

• Merit-based aid
  – Strategic use of institutional funds to support strategic recruitment
  – Prospective students, parents, and high school contacts must clearly understand the parameters
  – Communications must start early in the recruitment process
  – Selection must be timely
Types of Aid

• Need-based financial aid
  – Combination of federal, state and institutional dollars
    • Must meet compliance guidelines
  – Strategic use of institutional funds to support strategic recruitment
  – Prospective students, parents, and high school contacts must clearly understand the parameters
  – Communications must start early in the recruitment process
  – Requires coordination with merit-based aid
Alignment of Institutional Aid with Enrollment Management Goals

• Goals
  – Increase the quality measures of the incoming students
  – Enhance the diversity of the undergraduate students
  – Increase the international and out of state representation of undergraduate students
  – Maintain affordability
  – Enhance retention

• What is the correct priority for these goals?
Scholarships*

- Highest merit students
  - Bepko Scholars and Fellows Program
  - Hoosier Presidential Scholarships
  - Plater Distinguished Scholars Program
  - Honors Program Scholarships
  - IUPUI Outstanding Scholarships
  - Sam Jones Community Service Freshman Service Scholarship Program

*For details on the Scholarships go to http://www.iupui.edu/~scentral/
• **Students with academic merit**
  – Valedictorian /Salutatorian Scholarship
  – Academic Excellence Scholarship
  – Dean of the Faculties Scholarship
  – First Generation Scholarship
• **Students with need**
  – Incentive Grant—match amount of the academic merit grants
  – 21st Century Scholar Plus
  – Student Support Services Grant and Scholarship Programs
Scholarships

• Students with research interests
  – Undergraduate Research Opportunities Program (UROP)
  – Summer Research Opportunity Program (SROP)
  – McNair Scholars Program
  – Undergraduate Research Scholars Preparatory Program for McNair Scholars
  – Diversity Scholars Research Program (DSRP)
Scholarships

• Students from diverse backgrounds
  – Norman Brown Diversity and Leadership Program
  – First Generation Scholarships (previously presented)
  – Diversity Research Scholars Program (previously presented)
  – International Incentive Scholarship
  – Visa Fee Voucher Program for International Students
• Retention scholarships
  – Jesse H. & Beulah C. Cox Scholarship
  – Additional Retention Scholarships under consideration
Institutional Aid Proposals

• Diversity Initiative
  – Enlarge the Norman Brown Diversity and Leadership Scholars Program
    • $250K new funding

• Retention Initiative
  – Academic Improvement Grant
    • $235K
  – Continuing Student Achievement Grant
    • $250K

• Need Based Aid
  – 21st Century Scholarship Matching Institutional Grant
    • $660K
Total Financial Aid Awarded

Total Aid Awarded
(note: 2006-2007 includes estimated amounts for the remainder of the academic year)

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Total Grad &amp; Prof Aid Awarded</th>
<th>Total UG Aid Awarded</th>
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<tr>
<td>2004-2005</td>
<td>$96,881,605</td>
<td>$117,779,238</td>
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<td>2005-2006</td>
<td>$117,079,266</td>
<td>$126,221,447</td>
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<td>2006-2007</td>
<td>$118,736,859</td>
<td>$129,933,809</td>
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<table>
<thead>
<tr>
<th>Total Financial Aid Awarded</th>
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</thead>
<tbody>
<tr>
<td>$300,000,000</td>
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<tr>
<td>$250,000,000</td>
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Three Year Trend in UG and Grad Financial Aid by Category

Three Year Trend
(note: 2006-2007 includes estimated amounts for the remainder of the academic year)

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<tr>
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<tr>
<td>Federal Gift Aid</td>
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<tr>
<td>Institutional Aid</td>
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<td>Private Gift Aid</td>
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<td>Loans (Excluding Private)</td>
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<td>$30,000,000</td>
<td>$40,000,000</td>
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<tr>
<td>Private Loans</td>
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<tr>
<td>Federal Work Study</td>
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<td>$10,000,000</td>
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</table>

Legend:
- Federal Gift Aid
- State Gift Aid
- Institutional Aid
- Private Gift Aid
- Loans (Excluding Private)
- Private Loans
- Federal Work Study
Total Undergraduate Institutional Aid Awarded

(note: 2006-2007 includes estimated amounts for the remainder of the academic year)

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<td>Amount</td>
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• Questions and Answers
Contact

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