

Enrollment Management for Financial Aid Administrators: Career Pathways to the SEMO

January 30, 2020



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January 2020

Enrollment Management for Financial Aid Administrators: Career Pathways to the SEMO Position

Presented January 30, 2020

AACRAO & NASFAA Present:

Enrollment Management for Financial Aid Administrators: Career Pathways to the SEMO Position

January 30, 2020



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Enrollment Management for Financial Aid Administrators: Career Pathways to the SEMO Position

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Your presenters



Tom Green

- Associate Executive Director, Consulting and SEM
- AACRAO
- 32 years in higher education; more than 20 years as dean or VP of EM at seven colleges and universities
- Twice served as financial aid director at institutions



Chuck Knepfle

- Vice President, Enrollment Management, Portland State University
- Formerly Associate VP for Enrollment Management, Clemson University
- 28 years in higher education
- Director of Financial Aid at Clemson and Miami University

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Today's webinar agenda



- Overview of strategic enrollment management (SEM)
- What do we know about the senior enrollment management officer (SEMO) position?
- What does the job market tell us about potential openings in the field?
- What are the knowledge domains of enrollment management?
- What are some of the advantages and challenges that financial aid professionals might face in searching for a SEMO position?
- Professional development pathways
- Discussion and questions with the audience



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What is Strategic enrollment Management (SEM)?

Strategic Enrollment Management is a **comprehensive process** designed to achieve and maintain the optimum recruitment, retention, and attainment of students where “**optimum**” is defined within the academic context of the institution.

- Dolence, 1993

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What is Strategic enrollment Management (SEM)?

Strategic enrollment management is a **concept and process** that **enables** the fulfillment of **institutional mission** and **students' educational goals**.

- Bontrager, c. 2004

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What's in a name?

- Among 329 SEMO's surveyed, 217 different titles were reported
 - Vice President **for** Enrollment Management
 - Vice President **of** Enrollment Management
 - Associate Vice President for Enrollment Management
 - Registrar
 - Vice Provost for Enrollment Management
 - Dean for Enrollment **Management**
 - Dean of Enrollment **Services**
 - Director of Admissions
 - University Registrar

Source: Kilgore, W. 2017 *U.S. Chief Enrollment Management Officer Career Profile*. AACRAO, Washington, DC

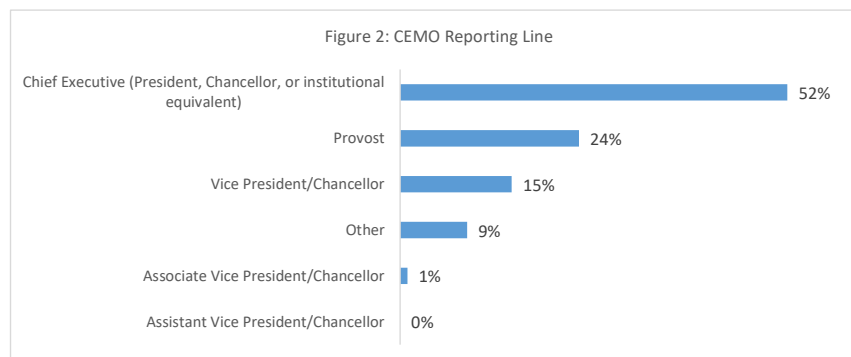
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To whom does the SEMO report?



Source: Kilgore, W. 2017 *U.S. Chief Enrollment Management Officer Career Profile*. AACRAO, Washington, DC

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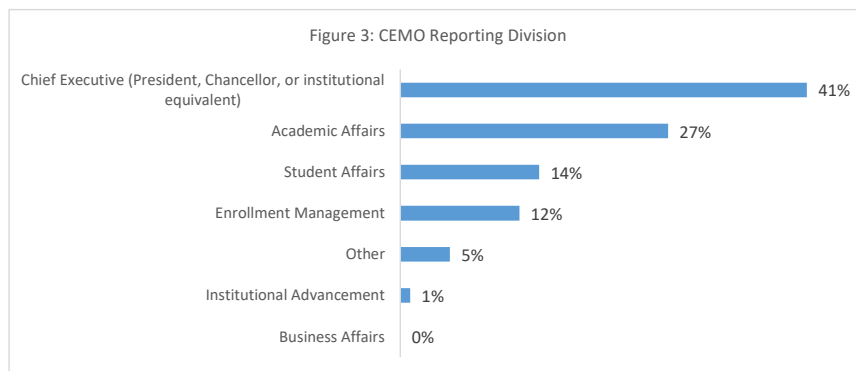
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Where in the organization does the SEMO report?



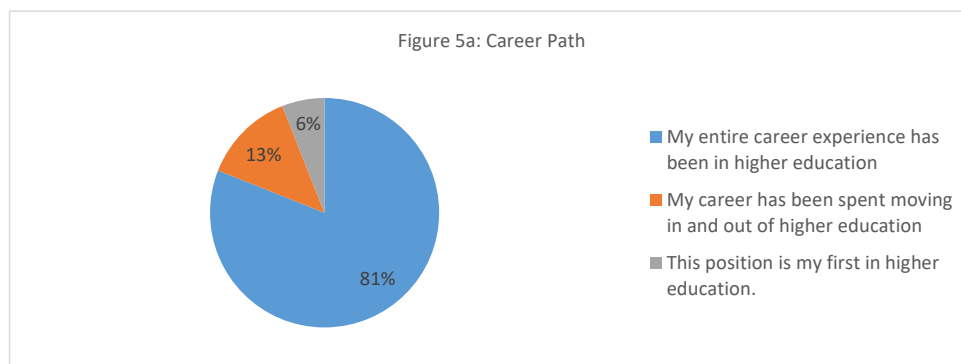
Source: Kilgore, W. 2017 *U.S. Chief Enrollment Management Officer Career Profile*. AACRAO, Washington, DC

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Most have spent their entire careers in higher education



Source: Kilgore, W. 2017 *U.S. Chief Enrollment Management Officer Career Profile*. AACRAO, Washington, DC

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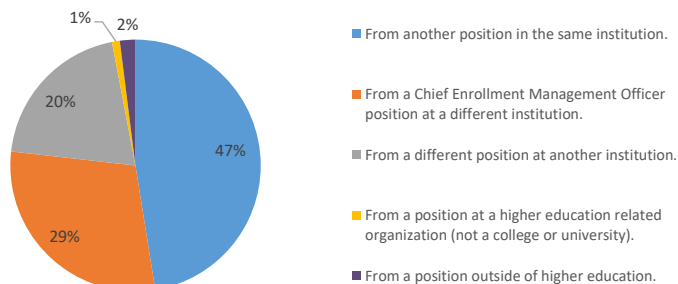
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There is no one way that people get into their current positions



Figure 6: Position Held Immediately Before Current CEMO Position



Source: Kilgore, W. 2017 *U.S. Chief Enrollment Management Officer Career Profile*. AACRAO, Washington, DC

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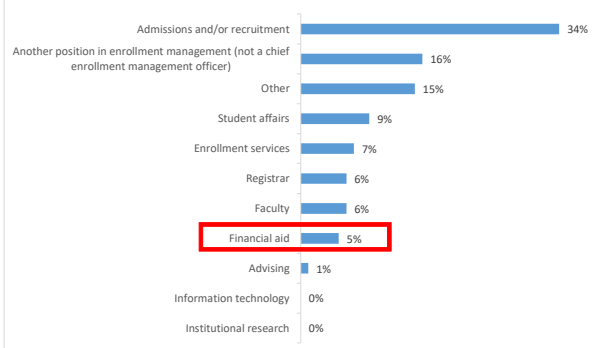
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Although admissions dominates their backgrounds, it is more varied than you may think



Figure 7: Higher Education Area of Employin Immediately Before Current CEMO Position



Source: Kilgore, W. 2017 *U.S. Chief Enrollment Management Officer Career Profile*. AACRAO, Washington, DC

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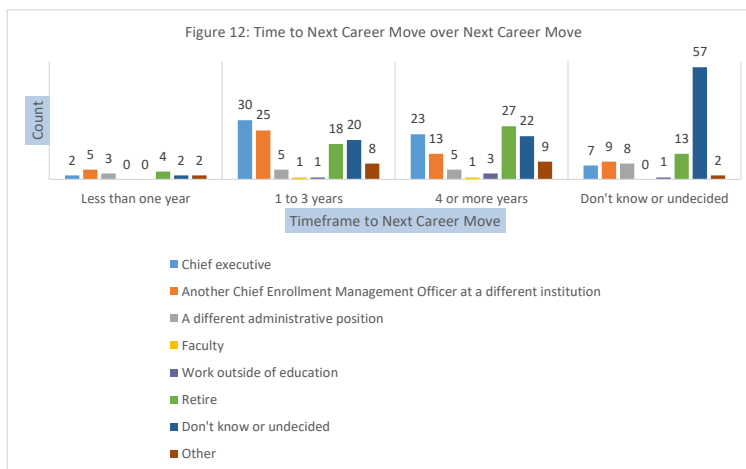
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Movement in the profession is common



Source: Kilgore, W. 2017 *U.S. Chief Enrollment Management Officer Career Profile*. AACRAO, Washington, DC

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There is a high need to identify and prepare the next group of leaders

When examining what the number is for all Title IV eligible, degree-granting institutions in the United States which are assumed to have a CEMO position, minus the percentage who seek another CEMO, there could be 748 CEMO vacancies in the next four years.

- Kilgore, 2017

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AACRAO Professional Core Competencies



Change Management
Ability to identify, design, and implement change within an enrollment management organization or campus and anchor this change within the unit's as well as the campus's culture and operations.



Interpretation and Application of Institutional and External Data
Understanding of institutional and external data in the context of what impact the data has on the long-term Strategic Enrollment goals of the institution and to monitor short-term operations. To be able to interpret and apply the data for the purposes of short term and long-range planning and strategizing. Uses data to support decision-making and creates a culture of evidence for achievement of short and long-term objectives.



Professional Integrity
Ability to carry out professional activities in an honest, professional and ethical manner. To engender a climate of trust and fairness in all dealings with students and colleagues within and outside the institution.



Collaborative Decision-Making and Consensus-Building
Ability to facilitate the processes needed to facilitate stakeholders' involvement, through the stages of collective and affective solutions, leading to a collaborative and collegial work environment



Leadership and Management
Ability to identify the functions and business processes necessary to operate an office, develop an operating budget, and build a professional staff to conduct the activities of the office. Ability to identify utilization and operationalize customer and student services best practices.



Communication
Ability to interact positively and work effectively with others.



Diversity and Inclusion
Diversity and inclusion are integral to all aspects of admissions, registrar, and enrollment management, and this proficiency focuses on the knowledge, skills, and attitudes needed to fully integrate such principles in all aspects of personal and professional practice.



Technological Knowledge
The ability to possess the appropriate technological knowledge and skills to function as a successful Academic and Enrollment Services professional.



Holistic and Systemic Thinking
Employs the ability to view the institutional culture and operations, holistically and systemically. Has a working knowledge and understanding of the applications of systemic thinking principles to the academic and service mission, goals and values of the institution.





Problem Solving
Employs an analytical and creative approach to address problems, while drawing on individual & collective skills, knowledge & experience.




Professional Development and Contributions to the Field
Support personal and peer professional development, contribute to the profession through presentations at state, regional, or national conferences; contributing towards professional association and academic journals; serving on professional association committees and leadership teams; and collaborating with colleagues to advance sound practices in academic and enrollment services. Engage with appropriate activities to maintain professional competency and innovation; ensure compliance with appropriate laws, policies, and regulations; and remain attuned to issues affecting higher education.

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AACRAO SEM Core Competencies




SEM Assessment
Work collaboratively with institutional research and other campus partners to assess progress towards the institution's enrollment management plan. Evaluate the institution's infrastructure, policies and procedures to determine the readiness to plan and implement strategic enrollment management plans.




SEM Leadership
Develop, articulate and implement a comprehensive, data-informed strategic enrollment management plan, that includes a focus on both recruitment and persistence, aligns with the institution's strategic initiatives and ensures a strong link between student need, institution-wide priorities, and financial planning. Provide high quality, innovative, student-oriented enrollment services by developing and implementing efficient, effective, and integrated policies, procedures and systems that improve student success across the student's educational lifecycle.



Enrollment Technology
Employ technology to develop innovative, efficient, and quality enrollment management processes and services.



Developing Enrollment Mix
Partner with academic affairs to determine optimum enrollment mix for institutional academic programs, branch campuses, and online programs, as well as student enrollment based on demographics such as geographic diversity, socio-economic and racial/ethnic diversity, and, other factors. Provide leadership for the development and implementation of the institution's enrollment management plan to meet the institution's enrollment goals; strategies to include admissions responsibilities such as market research and segmentation, marketing, promotion and recruitment initiatives as well as persistence and progression activities to include orientation, advising, registration, financial aid, and other support services.



Staffing Leadership
Provide leadership to enrollment management personnel and departments to develop the skills, strategies, and systems needed to successfully achieve enrollment management goals. Work with institutional leadership to envision and strengthen enrollment services processes that foster and value a culture of openness, diversity, and inclusion. Collaborate with institutional leadership to create cross-functional enrollment teams, including faculty, that plan, review and respond to enrollment trends in the institution.

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What are the challenges and advantages that financial aid professionals seeking a SEMO position might experience?

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My path...

- Miami University Admissions
 - Assistant Director Systems and Technology - 4 years
- Miami University Financial Aid and Scholarships
 - Associate Director Systems and Technology – 4 years
 - Director – 10 years
- Clemson University Financial Aid
 - Director – 5 years
- Clemson University Enrollment Management
 - Associate Vice President – 4 years
- Portland State University
 - Vice President – 1 year

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Advantages for financial aid professionals

- Besides the Admissions office, the financial aid office is the one that is most likely to report to the Enrollment Manager.
- We already know the hardest thing to learn – financial aid regulations and best practices.
- At many (most?) schools, a student's financial aid package is the most influential factor in whether they enroll.
- We tend to have advanced skill sets in budgeting and financial modeling.
- We have had extensive experience working with admitted students.

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Challenges for financial aid professionals

- With only 5% of enrollment manager jobs having been filled by financial aid professionals, we don't (yet) usually have the professional networks in the EM world.
- Campus leaders (trustees, chancellors, presidents, vice presidents, and deans) tend to see enrollment management as primarily an admission function and therefore lean towards admission professionals in their hiring decisions.
- We typically do not have marketing experience or expertise, and this is a skill set that campus leadership usually wants to see in a candidate.



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Challenges for financial aid professionals

- In the aggregate, people with strong admission backgrounds tend to have more experience with presenting.
- Although we have many of the skills valued in an enrollment manager, our primary responsibilities of compliance and customer service are not usually the primary skills being looked at for an enrollment manager.

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Challenges for financial aid professionals



- Admission professionals typically have a more extensive knowledge base about state, regional, and national enrollment trends and current issues.
- In my experience of searching for both Director of Admission and Director of Financial Aid positions, there are more people in the Admission world who are willing to move for a job. They tend to be less constrained by geography.

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Recommendations for a job search

- Re-write your cover letter and CV with a focus on your enrollment management accomplishments:
 - Scholarship initiatives
 - Cost savings
 - Diversity successesEmphasize why you want to be at THAT school.
- It may be tough to jump sectors until you've been an enrollment manager. Focus on your school or schools like yours.
- Take control of the room when you interview. VP/AVP positions are different than Director jobs. Soft skills are sometime more important than a specific knowledge base.

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Recommendations for a job search

- Know what enrollment challenges are being faced at the school you are applying to.
- The college enrollment cliff (2026ish) is real. Make sure you know about it and can extrapolate how the school you are interested in will need to adjust for it.
- Start your next degree or certification; be more educated than the next candidate.
- Lay the groundwork now by inserting yourself into enrollment management committees, work groups, and initiatives.



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Recommendations for a job search

- Be patient, it might take some time to both find the right match, and to build your skill set.
- Call one of the 5%!
 - Four of the last five NASFAA chairs currently have roles beyond financial aid at their institutions
 - Former financial aid directors hold enrollment management positions at the University of Colorado – Boulder, the University of Illinois Urbana-Champaign, Boston University, Texas A&M, Dillard University, Miami University, Ohio University, Sinclair Community College, and many others.
 - knepfle@pdx.edu

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Professional development resources



<ul style="list-style-type: none">• AACRAO<ul style="list-style-type: none">• Publications• Essentials of SEM online course• SEM-EP (online program resulting in professional registry)	<ul style="list-style-type: none">• NASFAA<ul style="list-style-type: none">• Publications• Career Center• Legislative & Leadership Conference (SEM Pathway)• Certified Financial Aid Administrator® (CFAA) Program• NASFAA Professional Credentials• Online Courses & Webinars<ul style="list-style-type: none">▪ March 11 – Enrollment Management for Financial Aid Directors
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Discussion & Questions

Q&A



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Thank you for joining!



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Policy Update*	12/17/2019
Verification 2020-21: Follow-Up Webinar	01/22/2020
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