

University of Montana Western Strategic Enrollment Management Plan
2023-2026

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SEM Plan Introduction

In 2020, the University of Montana Western developed a new Strategic Plan, Building on the Promise of Experience One 2020-2026. This plan was designed to build upon Montana Western's student success by adhering to the university's values and focusing on four objectives having the potential to strengthen and sustain the university.

One of these objectives is to enhance degree-seeking student recruitment, retention, and graduation. To support this objective, this Strategic Enrollment Management Plan was developed. In addition to supporting Montana Western's Strategic Plan, this SEM Plan will also explore ways to strengthen the university's enrollment and engagement of students in many different areas to help meet enrollment goals and metrics.

The Strategic Enrollment Management Plan is a shared institutional responsibility that requires involvement of every unit of the University of Montana Western. Student enrollment should be a holistic approach that helps to support a student from the point of inquiry to becoming an engaged graduate and alumni. This plan will help the Strategic Enrollment Management Committee to discuss enrollment strategies and to make recommendations that contribute to strengthening Montana Western's enrollment.

SEM Mission

Focused on the holistic student experience, Strategic Enrollment Management at the University of Montana Western uses data to align with the university's Strategic Plan to achieve enrollment goals through recruitment, retention, engagement, and completion.

SEM Vision

To create an active campus culture where students can learn and grow while feeling supported, cared for, valued, and successful.

SEM Guiding Principals

- Develop an integrated approach to enrollment that supports college-wide collaboration, engagement, and creative thinking
- Recommending and developing recruitment, retention, completion, and engagement goals and strategies for improving enrollment. And/or evaluate on-going enrollment trends, activities, and initiatives.
- Compiling and analyzing existing and ongoing institutional research on student engagement and student satisfaction to determine areas of strength and concern.
- Monitoring progress towards approved enrollment and retention goals
- Examining issues and recommending strategies related to student holistic success and maximizing student success.
- Integrating equity into metrics.
- Student leadership development.

SEM Definitions

Holistic Student Experience: inside and outside the classroom, encompassing the student's academic and personal wellness throughout the entire student experience.

Student Success: as a starting point, focus on standardized IPEDs and MUS definitions and metrics (performance-based funding, completion, retention, etc.).

Equity and Inclusion: as a starting point, focus on standardized MUS performance-based funding definitions of under-represented populations (veterans, non-traditional, Pell Grant recipients, minorities).

Completion: the awarding of a credit-bearing certificate or degree.

Recruitment: utilizing enrollment and university data to target, communicate, and encourage students to apply and enroll to the University of Montana Western.

Engagement: throughout a student's experience, students become an active participant of the university culture on-campus, online, and beyond.

Experiential Learning: authentic practice within an academic discipline or extracurricular activity.

Plan of Operation

Montana Western utilizes a Strategic Enrollment Management Committee to accomplish goals outlined in the SEM Plan. The SEM Committee is made up of members from across Montana Western and includes faculty, staff, and students. The SEM Committee meets as a group at least once a block to review the SEM Plan and to monitor enrollment at Montana Western. The Committee also examines external and internal trends that could impact enrollment over a three to five-year period.

The SEM Committee will often break into smaller sub-committees to work on enrollment processes and projects to help accomplish goals outlined in the SEM plan. This could include bringing in additional faculty, staff, or students to join the sub-committee to offer guidance and expertise in certain areas. These sub-committees typically will meet more regularly and bring strategies and recommendations to the larger SEM Committee to review, discuss and finalize proposals to campus leadership at the Director's Meeting or Chancellor's Cabinet. Once campus leadership has approved, the SEM Committee will work with other campus constituencies regarding implementation.

Additionally, when considering SEM initiatives, the committee will look for opportunities to cross collaborate with other committees or work groups on campus. When an initiative is brought forward that does not become a SEM initiative, the committee will assist in determining if the idea can be referred to another campus committee or workgroup.

Goals and Initiatives

The SEM committee annually develops and review deliverable initiatives which support Montana Western strategic plan, specifically Objective 2. When considering initiatives, the SEM committee will review ideas and suggestions through the lens of:

- How does the initiative support the Montana Western Strategic Plan?
- How does the initiative support continual improvement to further the University?
- How does the initiative strengthen and support holistic enrollment and student engagement?
- How would the initiative be measured and what would signal progress or accomplishment?

Additionally, the Enrollment and Retention Cycle (Appendix A) provides supporting strategies for SEM initiatives.

Example Score Card

Strategic Plan Objective Two: Enhance Degree-seeking student recruitment, retention, and graduation			
Strategic Plan Goals	SEM Initiatives	Measure	Progress
Increase degree-seeking enrollment by 1-3% annually, for a total growth of 14%.	<ul style="list-style-type: none"> • 1.1 Remove barriers through the application process to allow better access to all students. (Matt) • 1.2 Improve market share of Montana students and non-resident students through scholarships and affordability. (Matt) <ul style="list-style-type: none"> ○ 1.2.1 Develop merit-based scholarships for students to allow more access and affordability to resident and non-resident students. 	<ul style="list-style-type: none"> • 1.1 Increase the number and how quickly students are admitted starting in AY 22 • 1.2 increase to 2% of Montana Market Share • 1.2.1 Establish merit-based scholarships <ul style="list-style-type: none"> ○ After initial year add % increase goals) 	1.1 In progress 1.2 In progress
Increase underserved student enrollment by 1-3% annually, for a total growth of 14%.	<ul style="list-style-type: none"> • 2.1 MT 10 (Randy) • 2.3 TRIO SSS Program • 2.4 Continue and Expand Grant Programs (BCC, LBHC, OPI, Head Start) (Anneliese) • 2.5 Create greater awareness of UMW among MT Tribes (Randy) 	<ul style="list-style-type: none"> • 2.1 Increase retention of students eligible for MT10 program (comparable to TRiO %. -use this to establish baseline) 	2.1 In progress 2.3 In progress 2.4 In Progress 2.5 In progress

	<ul style="list-style-type: none"> ○ 2.5 .1Complete Tribal Flag Project 	<ul style="list-style-type: none"> ● 2.3 Meet annual Performance Goals for TRIO ● 2.4/2.5 Increase minority student enrollment and degree completions 	
<p>Montana Western will outperform comparator institutions based on student engagement indicators.</p>	<ul style="list-style-type: none"> ● 3.1 Enhance Paw Prints Program (Mike) <ul style="list-style-type: none"> ○ 3.1.1 Begin by strongly encouraging usage of Paw Prints program and move towards making it required. Requiring attendance at end of year semester functions. ● 3.2 Continue offering NSSE survey <ul style="list-style-type: none"> ○ 3.2.1 Focus on NSSE Quality of Interaction and Supportive Environment indicators 	<ul style="list-style-type: none"> ● 3.1 Increased participation in the Paw Point program (after baseline establish choose % increase goals) ● 3.2 Consistently show increased performance of HIP compared to peer groups. 	<p>3.1 In progress 3.2 Not Started</p>
<p>Montana Western will outperform comparator institutions based on student success indicators (retention, transfer, and graduation).</p>	<ul style="list-style-type: none"> ● 4.1 Post Admit Survey (Matt) <ul style="list-style-type: none"> ○ 4.1.1 Replace BCSSE advisor reports with Post admit survey report to advisors. ● 4.2 ACES (Randy) ● 4.3 Refining non-Faculty Advising Process (Randy) <ul style="list-style-type: none"> ○ 4.3.1 DegreeWorks implementation 	<ul style="list-style-type: none"> ● 4.1 Retention rate for the students who participated is higher than those who opt out. <ul style="list-style-type: none"> ○ 4.1.1 Increase number of academic advisors using 	<p>4.1 In progress 4.2 Not Started 4.3 In progress 4.3 In progress 4.4 Not Started</p>

	<p>complete include technology integration into DAWGS.</p> <ul style="list-style-type: none"> ○ 4.3.2 Catalog is accurate to most current year ○ 4.3.3 Move Registration appts (for main advisers) forward to match new REG dates ○ 4.3d Find/create and strategically place REG WEEK placards around campus immediately before and during REG WEEK <ul style="list-style-type: none"> ● 4.4 Collaborate with Athletic Department to incorporate enrollment increases amongst athletes Anneliese) 	<p>advising report.</p> <ul style="list-style-type: none"> ● 4.2 Identify, train, and on-board two AY2023 ACES by F2022 BL8 ● 4.2 Increased retention in ACES primary outreach population. ● 4.3 Increase the number and how quickly students are registered for the upcoming semester ● 4.3 Registration appointments last significantly shorter time than previous ● 4.4 Retention, Graduation, and GPA increase amongst athletes (eventually not goals of increase) 	
<p>Student engagement and success indicators will reflect equitable inclusion of all student groups.</p>	<ul style="list-style-type: none"> ● 5.1 Student Leadership Academy. (Mike) <ul style="list-style-type: none"> ○ Begin with strongly encouraging all student leadership groups to participate in academy and move towards making it required ● 5.2 Increase amongst student success indicators amongst underrepresented populations. 	<ul style="list-style-type: none"> ● 5.1 A Student Leadership Academy is established. <ul style="list-style-type: none"> ○ 5.1.1 Increase population participating in Leadership Academy by (?) % each year. ● 5.2 Retention rates of pop sub- 	<p>5.1 planning phase 5.2 In progress 5.2 In progress</p>

		<p>groups remains stable or increases each academic year (eventually add % increase goal)</p> <ul style="list-style-type: none">• 5.2 Completion rates of pop sub-groups remains stable or increases each academic year (eventually add % increase goal)	
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Appendix A: Enrollment and Retention Cycle

The following document outlines the enrollment and retention cycle of a standard academic year. Department involved in creating this document includes Provost Office, Admissions Office, Registrar's Office, Student Success Offices (i.e., TRIO and advising), Financial Aid, Business Services, Athletics, Bulldog Life, School of Outreach, and Institutional Research. The Enrollment and Retention Cycle is a separate document but provides guidance for the SEM Plan, particularly the "Areas of Potential Improvement".

Enrollment and Retention Cycle

Focusing on First-Time, Full-Time Freshmen

Application-to-Registration Process

1. Submit application
 - a. High School Transcript = Student is conditionally admitted.
 - b. MMRs = Student is officially admitted.
 - c. *Natural Horsemanship students complete an additional application.
2. Complete FAFSA
3. Complete Scholarship Application
4. Complete Housing Application
5. Complete VIBE Survey
6. Attend Registration Appointment

Student Leadership Groups

- Ambassadors (Admissions)
- Resident Assistants (Housing)
- P.A.T.H. (Mental Health)
- ACES (FYE, Student Success)
- Tutors (Student Success)
- TRIO Mentors (Student Success)
- ASUMW (Senate)
- ASA (Athletics)

Layers of Retention Support

- **Student Success (Academic Support)**
 - o Advising Office
 - o TRIO
 - o MT 10
 - o Disability Support
 - o Learning Center (Tutoring, Testing, Career)

- Manager of Online Student Success
- **Student Affairs (Student Life)**
 - Counseling Office
 - Bulldog Life
 - BIT/CARE (including Case Manager)
 - Health & Wellness
 - Dining Services
 - Parents
 - Peers
- **Academic Affairs**
 - Faculty
 - Dual Enrollment
 - ITS
- **Enrollment Management**
 - Registrar's Office
 - Financial Aid Office
 - Admissions Office
- **Athletics**
 - Coaches

High School Recruitment – Building Connections

- **Admissions**
 - *Pre-Senior Year*
 - Send juniors 5 emails (one every 2 weeks): connect with campus, invite to X-Days, 2 mailers, etc.
 - *September and Ongoing*
 - Send seniors 10 emails on a 1-week rotation and 4 mailers within one month describing application, financial aid, and academic processes.
 - Send email and postcard to ACT list.
 - Send "What Comes Next?" letters, emails, texts, and mailers.
 - Send emails from faculty when students express a disciplinary interest.
 - Award WUE scholarships.
 - Send High School Packets to every high school in Montana.
 - Re-recruit deferred students.
 - Travel to high schools and college fairs.
 - Send birthday cards to all prospective students.
 - *October – January*
 - Send spring registration and transfer information to Phi Beta Kappa lists.
 - Provide FAFSA information and workshops.
 - Send reminders of scholarship and FAFSA deadlines.
 - Begin re-recruitment campaign.
 - Send Happy New Year cards.
 - Send invitations to X-Day events.
 - Send Housing Applications.

- Prepare for room selection, Bulldog Card, and parking pass.
 - *February – May*
 - Award scholarships.
 - Disseminate VIBE survey.
 - Hold X-Day events.
 - Begin spring travel to high schools and college fairs.
 - Assign advisors and begin registration appointments.
 - Send “Student Success Postcards” highlighting current/recent students.
 - Invite incoming students to Bulldog Bound events.
 - Send graduation postcards and transfer postcards.
 - Invite students to Personalized Visits.
 - *June – July*
 - Hold Bulldog Bound events.
 - Send Orientation postcard.
 - Provide Vector trainings.
 - Send Orientation schedule.
 - Allow for Housing and roommate selection.
 - Begin issuing bills.
 - Provide Q/A session for parents.
 - *August*
 - TRIO Bridge students move in.
 - Orientation Week occurs.
 - Provide Online Bulldog Bound event.
 - Conduct NAIA/NIRA Certification.
 - Provide billing outreach for the No-Pay list.
- **Dual Enrollment**
 - Meet with high school counselors, hold career fairs on campus, and communicate with middle schools.
 - Visit regional high schools to promote UMW enrollment.
- **Athletics**
 - Hold “Junior Days” for football and invites juniors to campus.
 - Begin signing student-athletes.
 - Hold Athletics Camps.
 - Athletes move in early.

Freshman Retention Plan – Providing Layers of Support

- **Summer**
 - *Student Leadership Academy* – Week-long training to all student leaders (8 groups).
 - *Summer Outreach* – Retention Team divides incoming students into groups; makes initial connections.
 - *VIBE Connections* – ADA, Counseling, Clubs, Academic Interests, Hobbies
 - *Orientation Interest Groups* – Engage in interest-specific, connection-building activities (created by VIBE).

- **Block 1 through 8**

○ ***Student Success (Academic Support)***

- Disability Services Intakes and Accommodations
- Advising/TRIO/MT10/Online Advising/ACES (driving toward registration and holistic support)
- Learning Center Outreach (driving toward academic success)
- Programming for Multicultural Center and VMX (driving toward belonging)
- Block 1 Retention Team Weekly Check-In Topics:
 - Week 1 – Self Care (sleep, diet, exercise, boundaries, etc.)
 - Week 2 – Study Skills, Tutoring
 - Week 3 – Library Resources, Plagiarism, Student Life Activities
 - Week 4 – Homesickness, Counseling, Resilience
- High-Priority Retention List – Formed from End-of-Block Grade Report and Resident Life Wellbeing Survey. Retention Team (Advisors, TRIO, MT10, Online, Tutors, ACES) divides list into groups.
 - Interventions – Outreach with offers of support and resources (see Layers of Support).
 - End-of-Block Grade Report – Those with C- or lower in Block 1.
 - Residence Life Surveys – Which students in Residence Halls are struggling?
 - Red Students – Multiple End-of Block Grade Reports and/or Residence Life Surveys. Also, red flags on VIBE could support Red or Yellow designation.
 - Yellow Students – Those who show up on one report/survey. Also, VIBE red flags.
 - Green Students – Those who don't show up on any report/survey.
- Faculty Advisors are assigned in Block 2.
- Advising Workshops

○ ***Student Affairs (Student Life)***

- Welcome Fair (Clubs)
- Programming for Bulldog Life, ASUMW, and P.A.T.H.
- BIT/CARE begins meeting and reaching out to students.
- Dining surveys
- Group counseling begins Block 2
- Vector trainings begin Block 2

○ ***Academic Affairs***

- Academic Department Block Parties
- FYE Cohorts
- Math and English Placement Surveys?

○ ***Financial Services and Enrollment Management***

- Roster Verification
- No-Pay List
- Recruiting (Ongoing)
- FAFSA Communication and Workshops
- Consumer information card

- **Blocks 3 and 7**
 - *Registration* – Weeks 1-4 – Registration Campaign. Week 2 – Registration Begins
 - *Not-Yet-Registered List* – Daily list goes to Retention Team. Weekly list goes to faculty advisors.
 - *FAFSA/Scholarship* – Workshops continue.
 - *Housing* – Intent process begins.

Areas of Potential Improvement – As of 12/2022

- **All of us...**
 - Give friendly greetings to prospective student tour groups.
 - Give friendly greetings to current students around campus.
 - Create a one-stop-shop email address that is monitored daily.
 - Identify metrics that keep retention efforts at the center of our focus.

- **Student Success (Academic Support)**
 - Provide more intentional Personalized Visits for incoming students (with Enrollment Management)
 - Investigate the use of Slate for advising communications.
 - Assign advisors early.
 - Conduct Advising Workshops early.
 - Hold more Advising Workshops for online-only students (with Manager of Online Student Success).
 - Solidify the End-of-Block Grade Report (with IR) and Residence Life Wellbeing Survey (with Housing).

- **Enrollment Management**
 - Ensure FAFSA workshops are robust, occur often, and are well advertised.
 - Provide Financial Aid award letters and scholarship award letters as soon as possible in the process.
 - Begin Registration during Week 2 of Blocks 3 and 7.
 - Provide more intentional Personalized Visits for incoming students (with Student Success).
 - Ambassadors test the registration process every year.

- **Student Affairs (Student Life)**
 - Ensure a smooth and well communicated Housing application process.
 - Create and solidify Residence Life Wellbeing Survey (with Student Success).

- **Athletics**

- Strive toward a centralized office for information and communication.
- Communicate with students and prospective students about coaching changes.
- Send the Registrar's Office a list of student-athletes who were cut or who quit the team during tryouts.
- Consider a Wellbeing Survey for student-athletes that can tie into Student Success' interventions.

- **Dual Enrollment**

- Increase focus on matriculation from high school Dual Enrollment to UMW freshman class.

Appendix B: Admission's Office Recruitment Plan

Recruitment Plan

University of Montana Western, Admissions Department

Introduction

The plan is divided into several major sections, including:

- Target Markets
- Travel
- Contact Management
- Faculty Relations
- General Messaging
- Data Management
- Timelines
- Ties to the Montana Western Strategic Plan
- Ethics and Practices

It is the goal of this plan to outline a tactical approach to the activities that must be completed in the Admissions Office. There is a section of this document that outlines the data collection necessary during the year so as to have a more informed planning process in future years.

It is also acknowledged that the Admissions Office completes other projects and initiatives during the year that may not be outlined in this document.

Target Markets

The Admissions Office targets students from specific states, most importantly Montana. In addition, students from WUE states are targeted as well as states that show potential or high yield.

The Traditional Student

The majority of our recruiting efforts are focused on the traditional pre-college student, i.e., the student that is a junior or senior in high school. The travel we have designed, the messages that accompany our recruiting, and the focus of our resources are on this population.

The Non-Traditional/Transfer Student

Non-traditional students can include transfer students, students over the age of 21, students who have family, students who have full-time work commitments, etc.

Relationships with the Montana 2-year colleges are being nurtured and a strategy is in place to go to these campuses and meet with students who wish to transfer to UMW. Academic advising staff and admissions representatives have teamed up to visit campuses and do in person transcript evaluation and help with the file transmittal process.

The admissions staff has participated in transfer college fairs in California, Idaho, Texas, Nevada, Wyoming and Colorado. These fairs are hit and miss. Transfer college fairs will continue to be a part of the recruitment strategy.

There is not currently a formal plan in place to recruit non-traditional students who are not transfer students.

The Diverse Student

Montana Western recognizes that ethnic diversity in Montana, with the exception of Native American students, is limited. Also, the largest population of ethnic students on campus are athletes.

As such, Admissions has a desire to focus attention on continuing to develop these populations. Over the past 3-5 years we have worked diligently and consistently to try to grow a more diverse student population. We have added numerous college fairs and high school visits in both northern and southern California as well as adding fairs and visits to Alaska and Hawaii. Furthermore, UMW has participated in the Montana Tribal College Fair circuit since its inception in 2007.

Travel

- **High School Visits.** HSV's involve an admissions representative contacting each high school and setting up some time to visit with the college counselor and any interested students at that high school. It is time and travel intensive.
- **High School Counselor Connections.** Our goal is to make a personal connection with high school counselors around the state by visiting high schools and sending information and material about Montana Western.
- **College Fairs.** These fairs are often sponsored by NACAC (National Association of College Admissions Counselors) or regional chapters of the national organization. They involve having a representative staff at a table during the fair and visiting with students that stop by. This is a high exposure activity which is less time intensive than visiting multiple area high schools.
- **Alumni Connections.** This is a developing recruitment strategy that involves setting up events for alumni in particular regions so as to share the latest news and recruiting efforts with them. In turn, it is hoped that they take that information back to their areas. These events would be coordinated in conjunction with Alumni Affairs.

We will deliver a consistent **message** to each state during recruitment, creating a broader understanding of the brand of Montana Western. That message is:

“The University of Montana Western is the most innovative public university in the US. Through our block scheduling program (Experience One) our students experience the curriculum with hands on learning, research, exploration, field study and application of knowledge and skills in every class they take. Our award-winning faculty have been named the best in their fields and work closely with our students. All this while remaining a best value in the West with affordable tuition for both in-state and out-of-state students.”

All of these travel plans will be designed by the recruiters. Designs should include travel timelines, locations, and costs.

MONTANA

HSV: Representatives should attempt to visit every feeder school (those that supply a healthy number of students to us each year) and to visit at least half of the schools that provide only 1-2 students to us each year. If time permits, more schools can be visited. We also support current

student home to visit their home high schools over holiday break in a program called “Home for the Holidays”.

FAIRS: UMW attends the entire MPSEOC circuit and counselor update in the Fall and the full Tribal College Circuit in the Spring.

WYOMING

HSV: If time allows, we engage in HSV’s.

FAIRS: We attend one to two weeks of HS and transfer fairs around WY.

IDAHO

HSV: ID is a major market. We do a variety of HSV’s.

FAIRS: We attend all of the ID fairs.

WASHINGTON

HSV: If time allows, we engage in HSV’s.

FAIRS: We attend all NACAC and PNACAC Fairs plus we do a smattering of WA college fairs in most rural areas.

OREGON

HSV: If time allows, we engage in HSV’s.

FAIRS: We attend all NACAC and PNACAC Fairs plus others if the schedule permits.

HAWAII

HSV: We visit 20-30 high schools each fall if the budget allows.

FAIRS: We attend the NACAC fair in the fall. We use alumni to cover this fair to help reduce multiple trips to Hawaii.

ALASKA

HSV: We do not currently do HSV in Alaska.

FAIRS: We attend the entire Alaska CF circuit.

CALIFORNIA

HSV: We do a variety of HSVs in southern California and northern California.

FAIRS: We attend a wide range of CF in northern & Southern CA

UTAH

HSV: We do not currently do HSV in Utah.

FAIRS: UT has closed all but 1 college fair to out-of-state colleges. We attend the fair in SLC.

NEVADA

HSV: If time allows, we engage in HSV's in southern Nevada and spend about a week visiting schools in northern Nevada.

FAIRS: Las Vegas area, Pahrump Valley, Reno, and northern Nevada.

MINNESOTA

HSV: We do not currently do HSV in Minnesota.

FAIRS: We attend the national college fair in Minnesota every fall.

TEXAS

HSV: We currently do not attend HSV in Texas.

FAIRS: We did a variety of CF in Texas in the past but have not done anything recently due funds.

ILLINOIS

HSV: We currently do not attend high school visits in Illinois.

FAIRS: We attend the fall NACAC fair.

WISCONSIN

HSV: We currently do not attend HSV.

FAIRS: We attend the fall NACAC fair.

Contact Management

Contact Management refers to the process involved in furthering a student's decision to apply and enroll to Montana Western. Once a prospective student shows an interest in Montana Western they enter our database driven communication plan. This communication plan is automated and is run out through a Banner process managed by the Admissions Director.

RECRUIT COMMUNICATION PLAN

Step 1: First Contact. This contact may be through a phone or email inquiry, a campus visit, a "drop-in", a meeting with a recruiter in the field, or other method of inquiry. The students provide us with their contact information through an inquiry card, a college fair scanner, Web Request, or an additional process. We then enter that student's information into Slate as an inquiry/recruit.

- Step 2: New Communication Plan Brochure (REC NEW). Once a student has been entered into Slate, they will receive this brochure ASAP. This brochure is sent weekly to students who are in a prime term (upcoming fall and spring term) and monthly to students who are in the pre-prime (future fall and spring terms) term. This mailer introduces the student to UMW highlights unique aspects of the university.
- Step 3: Recruit 1st Letter (REC 1st). For students that are in the prime term they will receive this letter one week after the REC NEW letter. This letter identifies actions that the student needs to be taking in order to enroll for the upcoming term.
- Step 4: “Your Future is Waiting” Rack Card. For students that are in the prime term they will receive this postcard one week after the REC 1st letter. This communication has more information on UMW and encourages the student to complete an online application.
- Step 5: Department Information. For students that are in prime term they will receive a rack card highlighting their academic department one week after the Your Future is Waiting Rack Card. This is a rack card from the department introducing students to their desired area of study. For undecided students we mail a rack card that highlights all academic programs.

The purpose of the recruit communication plan is to drive the inquiry/recruit to submit an application for admission. Once a student has applied to UMW they are taken out of the Recruit Communication Plan, and they are added to the Applicant Communication Plan. If a student does not apply, they will receive continued monthly communication driving them to do so.

APPLICANT COMMUNICATION PLAN

- Step 1: Application Letter and Personal Contact. Once a recruit/inquiry applies they are sent a letter notifying them that we have received their application and identifies information that we still need to complete their file. During this time an Admissions Representative will contact the applicant by phone. The rep will

thank the student for applying, inform them of the admissions process, timeline, and be the point of contact for them.

- Step 2: Current Student Letter. This letter is sent out one week after the student applies. It is a letter from one of our current students welcoming the applicant to Montana Western. The letter also highlights why the current student chose UMW and his/her experience here.
- Step 3: Parent Letter. Sent to the parent or guardian of first-time traditional freshmen students one week after they receive the Current Student Letter. The letter highlights the parents' experience in the college selection process and mentions the benefits of Montana Western.
- Step 4: Application Post Card/Email. Once a student sends in information for their admissions file, but it does not change their status we send a post card/email notifying the student of the items received and what we still need to complete their file.
- Step 5: Acceptance Letter. Once a student has sent in enough information an admissions decision is made and we send an acceptance letter. There are 3 versions of this letter. One admits a student into a 2-year program, one provisionally admits a student into a 4-year program, and one fully admits a student into the university.
- Step 6: Fully Admitted Letter. This letter is sent once we have all final and official documentation for the applicant's admissions file.

The purpose of the Applicant Communication Plan is to aid the applicant through the admissions process and increase yield from applied to enrolled. We are always looking for ways to improve our Database Driven Communication Plan.

In addition to the Database Drive Communication Plan, we have a monthly communication plan wherein students receive time sensitive information from UMW depending on their status as an applicant or recruit, their term of entry, and time of year. We use several different forms of contact management for this process.

Traditional Mail: Campus visit brochures, ACT direct mailer, letters about admissions status and recruitment, scholarship information, information regarding the student's next steps for enrollment, Bulldog Bound and XDAY invitations, WUE information, Happy New Year postcard, birthday postcard, graduation postcard, and counselor packets.

Email: Monthly emails that highlight our general message and benefits of UMW, information informing applicants of missing items admissions material, email regarding admissions status and recruitment, scholarship information, department and faculty information, and Bulldog Bound and XDAY information.

Phone: Calls are made to every applicant thanking them for applying and providing support, Operation Shepherd is a call campaign to shepherd in applicants who are more likely to enroll, and calls are made to all students who do not complete an online application.

Faculty Relations

It is widely acknowledged that the more participation from faculty in the recruitment process, the more successful Montana Western will be at attracting students. We are looking to implement the following strategies for the upcoming recruitment cycle.

Faculty Meetings

The Admissions Director should request time with the Director of Student Success and Department Chairs to visit the Admissions Staff before each recruitment year. The benefits of this meeting would be to update the Admissions Staff on degree and career options to better recruit new students.

Departmental Input

The Admissions Director should solicit from each department the messages that they would like the admissions staff to convey to potential students about their program. It would be helpful if the departments could furnish a list of potential careers associated with their degree.

Designing Active Recruitment Strategies and Material

Many faculty have expressed interest in becoming more active with the Admissions Department in recruiting efforts. With faculty input, the Admissions Director should collaboratively design such opportunities. Furthermore, the Admissions Director should work with Department Chairs to design materials that highlight specific programs.

General Messaging

Beyond specific messaging determined for each department (as outlined in the Faculty Relations section) and each state (as outlined in the Travel section), there are five general themes that Admissions will use in recruiting each year. These are influenced by the marketing initiatives developed by the Marketing Director and briefs as to the components of these messages will be developed and delivered by Marketing to Admissions.

Experience One

This makes us unique. Admissions staff should emphasize experiential learning, one-class-at-a-time, hands-on experiences, and individual attention by faculty.

Visually Stunning Environment

Admissions staff should emphasize specific aspects of our natural environment and location.

“All About Fit”

Determining the needs of the student first, and then tapping into the specific reason why Montana Western fits their needs is the first recruitment strategy recruiters should employ. This means spending some time with a student determining the right program for them and if our environment is the right type for them. Also, all applicants from WUE states must be informed that they are eligible for the scholarship if they attend. This helps encourage students that Montana Western is a financial “fit” for them.

Quality Faculty

Admissions staff should highlight our award-winning faculty and the personal attention that students receive.

Affordability

Montana Western is the most affordable 4-year university in the state of Montana and one of the most affordable in the west. With our university scholarships, like the WUE, we are often the most affordable school for out of state students as well.

Data Management

There is a consensus that data must drive our recruitment planning. The importance of a relationship with the Registrar’s Office is crucial to obtain recruitment data. This section articulates the needs of the Admissions Office and what data should be collected throughout the years for each recruitment cycle.

Data Needed (Student Profile)

- Transfer students
 - o Where do they transfer from?
 - o What programs are they in?
 - o How many students are graduating?
 - o What is our transfer student funnel?

- Traditional Students
 - o What state do they come from?
 - o What major (as a function of their state) do they choose?
 - o What is the retention of first year students overall and by program (as a function of academic achievement)?
 - o What is the admissions profile of each incoming class and of our graduating students (as a function of academic achievement)?
 - o How many students are graduating?
 - o What is our traditional student funnel?
- Contacts
 - o How do students learn about Montana Western?
 - o What is the first contact with recruits and applicants?
 - o What contact has the highest yield?
 - o How many first contacts result in applications being sent in?
 - o How many first contacts result in a student enrolling?
 - o What are the most common contacts we make?
 - o How many contacts made at out-of-state functions result in an applied and/or enrolled student?
- Travel
 - o What was the cost of the travel to each state (as a function of the number of students enrolled from that state)?
 - o Breakdown of applicants and enrolled student by state.
 - o What are the high school enrollment rates for specific states?
 - o Montana Western students from out-of-state should be polled to determine what drew them to Montana Western, what messages were important, and why they committed to Montana Western.
- Graduation
 - o What are our graduation rates?
 - o What are the placement rates of programs?
 - o What are our successful graduates doing?

Fall Activities

- High School Visits, Round One (HS Seniors)
- College Fairs
- Start Communication Plan for Prime Spring and Fall Terms
- Information to HS Counselors
- Information to MPSEOC and participation in the Counselor Update
- Contact Management
- Fall Campus Visitation Day (may explore for future terms)
- Phoning Prospects. Operation Shepherd.
- Begin Data Gathering
- Home for the Holidays
- Faculty Relations

Spring Activities

- College Fairs
- High School Visits, Round Two (HS Juniors & Seniors)
- Visit to MUS 2 Year Schools
- Scholarship Process
- Spring Campus Visitation Day (s)
- Spring Bulldog Bound Event
- Spring Phoning. Operation Shepherd
- Continue Prime Fall Communication Plan
- Continue Data Gathering

Summer

- Continue follow-up with students
- Engage in review of Admissions publications
- Plan Travel
- Bulldog Bound
- Orientation
- Summer Phoning. Operation Shepherd
- Continue Prime Fall Communication Plan
- Faculty Relations

Ties to the Montana Western Strategic Plan

This Recruitment Plan has distinct ties to the Montana Western Strategic Plan found at:

<https://www.umwestern.edu/wp-content/uploads/UMW-Strategic-Plan-20-26.pdf>

In summary, the Recruitment Plan was developed with consideration of the following:

Missions Statement

As a leader and innovator in experiential education, the University of Montana Western educates undergraduate students through immersive practices in their field of study, strives for continuous improvement, and achieves evidence-supported student learning and achievement outcomes.

Vision Statement

The University of Montana Western will be recognized as the leader in innovative experiential education.

VALUES

These values guide our actions in every area of our work.

- **EXPERIENCE:**

Continuously improve undergraduate education and experiential learning.

- **EQUITABLE, INCLUSIVE STUDENT SUCCESS:**

Maximize campus-wide support for student success and completion. Ensure student success is equitable and inclusive, including first-generation students, low-income students, and students of color.

- **STEWARDSHIP AND SUSTAINABILITY:**

Foster responsible and sustainable campus efficiency and stewardship of resources.

- **COMMUNITY RELATIONS AND PARTNERSHIPS:**

Share resources and partner with the community to serve community needs and offer distinctive and relevant programs.

- **HEALTH AND SAFETY:**

Foster safe, healthy practices in all areas of the university.

Objectives

1. Strengthen the Experience One Program
2. Enhance degree-seeking student recruitment, retention, and graduation
3. Enhance and diversify financial resources
4. Modernize and Update the University's Infrastructure

Additionally, this plan was developed with the following objective and strategies in mind:

Objective Two is focused on promoting student success and degree completion.

- **STRATEGY ONE:** Practice Strategic Enrollment Management.
- **STRATEGY TWO:** Promote Student Engagement.
- **STRATEGY THREE:** Annually earn 100% of available Performance Funds.

Ethics and Practices

University of Montana Western Admissions Staff shall:

- conduct themselves in a manner that upholds the University of Montana Western's Mission and Vision Statement;

- promote and represent the university and its services in an accurate and ethical manner;
- follow applicable laws, regulations and rights of students and promote student privacy at all times;
- conduct themselves in a way that shows respect, honesty, and integrity towards students, parents, guests, co-workers, and the community;
- not accept gratuity or any reward from other organizations or programs that wish to influence the universities decision or the decision of the student;
- follow the universities policies and admissions requirements and do not guarantee placement or any other university decisions that is not printed in recruitment material;
- dress and behave in a way that represents the university and promotes it in a professional way;
- not use disparaging comparisons of secondary or post-secondary institutions;
- follow the regulations of national and regional associations of college admissions counseling;
- follow State Board of Regents and Office of Public Instruction policies.

Appendix C: Student Retention Plan 2023-2026 Retention Plan (In Development)

Introduction

The retention plan is a living document that sets goals and develops strategic initiatives to support the University Strategic Plan Objective Two: “Enhancing degree-seeking student recruitment, retention and graduation.” Initiatives generally support the following indicators of progress in Objective Two:

- Increase degree-seeking enrollment by 1-3% annually for a total growth of 14%.
- Increase underserved student enrollment by 1-3% annually for a total growth of 14%.
- Montana Western will outperform comparator institutions based on student success indicators (retention, transfer, and graduation)
- Student engagement and success indicators will reflect equitable inclusion of all student groups.

Additionally the retention plan addresses support for Montana University System (MUS) goals related to Performance Based Funding and the Success Agenda in the MUS strategic plan. Specific areas that this plan supports in these areas of the larger MUS and in turn UMW are:

- Performance Based Funding Objectives alignment
 - Increase success of under-represented student populations.
 - Improve student success in freshmen year (i.e. freshmen/sophomore retention)
 - Increase the number of students completing degree and certificate programs
- MUS Strategic Plan Success Agenda
 - Retention: Improve retention and completion rates of students by promoting and employing system wide strategies.

Data Needs:

Data-informed decisions drive the UMW retention plan. This section articulates the regular data needs required to support this plan as well as steps to consider when creating a new retention initiative.

Regular Data Needs:

- Retention data by student profiles
 - Overall student body
 - MUS-defined underrepresented populations
 - Designated populations based on retention initiatives
- Completion rates by student profiles
 - Overall student body
 - MUS-defined underrepresented populations
 - Designated populations based on retention initiatives
- End-of-Block grade data
- Student wellbeing data
- DFWI data

Retention Objectives and Actions:

Objective One: Develop a campus culture that embraces student engagement and success through community building, belonging, and a sense of a friendly campus.

2023-24 Action Items:

Action Items		Lead/Contact	Metrics/Measures	Status/Notes
1.	Using the VIBE survey, incoming students with various needs are assigned to a support office or person to provide early support opportunities	Randy Johnson and Jaime Ochoa	% of incoming students who have been assigned to a support office	<ul style="list-style-type: none"> •Determine what groups will receive assignments and how that will be documented. •Develop, Implement, and Standardize a contact plan for assigned students (i.e. what are the responsibilities of those that are support contact office or person
2.	Develop sustainable programming through the multicultural center and VMX that encourages a sense of belonging and understanding of diversity.	Randy Johnson	# of programming events per semester	<ul style="list-style-type: none"> •This work could be in collaboration with other groups, such as the Multicultural Club.
3.	Increase financial aid/literacy knowledge with students	Financial Aid		<ul style="list-style-type: none"> •Ensure FAFSA workshops are robust, offered often, and well advertised.

Objective Two: Offer a robust, modern, efficient, and supportive student success environment through developing practices that embrace and understand the student experience.

2023-24 Action Items

Action Items		Lead/Contact	Metrics/Measures	Status/Notes
1.	Update intake and accommodation practices related to disability services.	Randy Johnson		

2.	Create a one-stop shop email address that is monitored daily.	?		
	Revamp advising workshops			<ul style="list-style-type: none"> • Offer advising workshops earlier • Create advising workshops for online students • Strengthen online materials assisting students with advising process
	Create a program to ensure every student who is struggling receives personalized support (Safety Net Program)	Randy	# of students who were personally contacted through the Safety Net Program	
	In support of the Safety Net Program, create and use Residence Life Wellbeing Survey	Resident Life/Student Success	# of students who were personally contacted through the Safety Net Program	
	In support of the Safety Net Program, use end-of-block grade reports.	Student Success	# of students who were personally contacted through the Safety Net Program	

Objective Three: Engage the entire campus community in retention efforts, creating an environment that encourages learning, creativity, and action to engage and retain UMW students to completion.

2023-24 Action Items

Action Items		Lead/Contacts	Metrics/Measures	Status/Notes
1.	Identify Metrics that keep retention efforts at the center of focus			
2.	In support of the Safety Net Program, use create and use Early Alert System	Student Success	# of students who were personally contacted through the Safety Net Program	

Action Items		Lead/Contact s	Metrics/Measures	Status/Notes

Objective 2:

Action Items		Lead/Contact s	Metrics/Measures	Status/Notes

Objective 3:

Action Items		Lead/Contact s	Metrics/Measures	Status/Notes