

ENROLLMENT STRATEGIC PLAN FRESHMEN & TRANSFER EXECUTIVE REPORT

2020-2024



UMass

| Dartmouth

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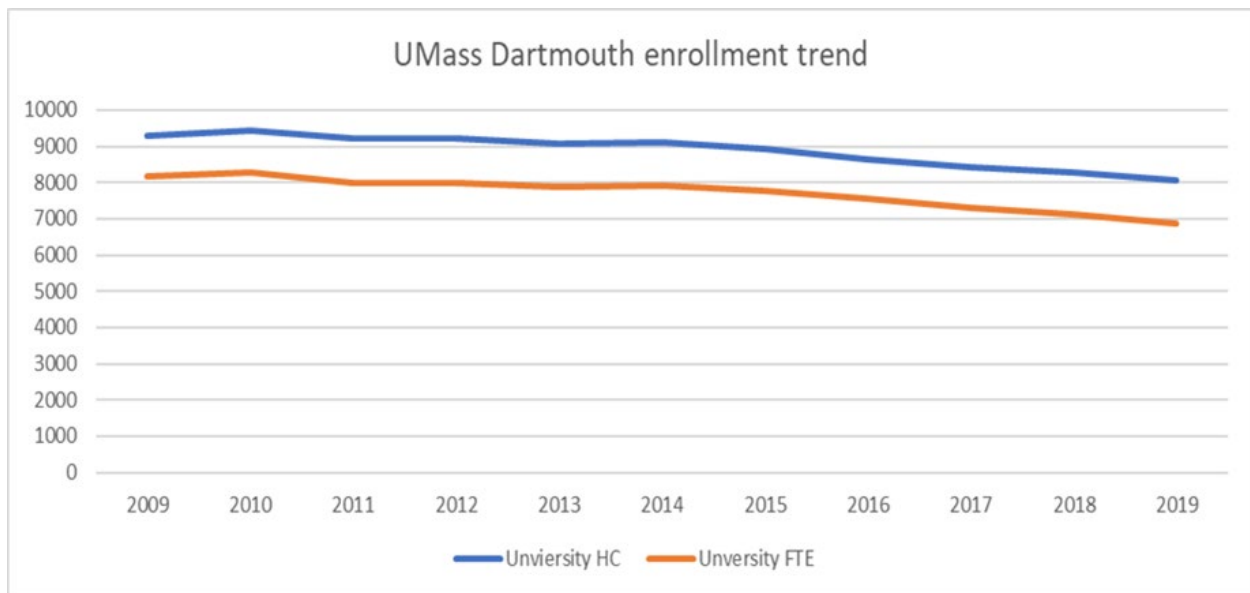
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Introduction

Ranked by *U.S. News and World Report* among the top 218 national universities, among the top 16 best colleges in Massachusetts, and the only comprehensive research university south of Boston, the University of Massachusetts Dartmouth, ranked 3rd amongst the 4 public National Universities in Massachusetts, provides an intimate learning environment for highly qualified students who pursue academic programs through 57 majors and 47 professional and doctoral programs, including the UMass School of Law, the Commonwealth's only public law school.

Over the past decade UMass Dartmouth has faced some challenges in growing its enrollment as seen in the figure below.



This document outlines key strategic and tactical actions to increase the enrollment of new first-time undergraduate freshmen and transfer students. These actions provide the framework for the University's strategic enrollment plan for undergraduate students.

The plan acknowledges the following key headwinds and market opportunities that must be leveraged.

Market Headwinds

1. Demographics of Massachusetts and greater New England are providing stiff competition for traditional enrollment, both freshmen and transfer.
2. Competitive pricing of regional public universities and high-discount private institutions are diminishing the market advantage of “in-state”, “out-of-state”, and UMass Dartmouth’s “proximity” tuition rates.
3. As institutions re-bundle existing academic programs both in terms of discipline and majors earned (i.e. 3 plus 1, 4 plus 1, etc.) traditional academic offerings both in terms of discipline, format and degree earning ability will challenge traditional programs.
4. UMassD Brand Identity
 - i. MA residents’ perception of UMassD brand compared to other UMass System institutions (need to strengthen value proposition within MA).
 - ii. UMassD’s brand identity outside of Massachusetts (need to sell UMassD as high-value option outside of MA).
5. Industry trend of moving to some level of AI for interacting with students (use of BOTS), and broader multi-channel communications requiring an adept CRM system.
6. Ever-changing social media platforms used by prospective students.
7. Increasing faculty engagement in the recruiting process.
8. Forty-nine percent of UMass Dartmouth’s entering freshmen have an Expected Family Contribution (EFC) of \$5,576 or less, making our students’ ability to afford our education unique among our sister UMass campuses. (See page 23 for further explanation.)

Market Opportunities

1. UMassD has strong academic programs and outcomes. Must leverage these two value propositions through new marketing approaches and content. This includes taking an inventory of recent undergraduate degree completers.
2. UMassD pricing is competitive within the market. Should monitor discount rate closely in relation to both in-state and out-of-state tuition rates of the UMass System as well as competing public institutions in the New England region.
3. UMassD has the capacity to increase enrollment and has experienced pockets of growth that need to be leveraged.
4. New campus facilities.

Key Admissions Trends

Reference: *2019 State of College Admissions*, published annually by NACAC

The University benchmarks its new student recruitment and enrollment each year against other institutions.

- **Applications.** The increase in the number of colleges to which each student applies continues an upward trend. Between the Fall 2017 and Fall 2018 admission cycles, the number of applications from first-time freshmen increased 6 percent and international student applications increased by 7 percent. Transfer applications were up 2 percent overall, but public colleges experienced an average 1.7 percent decline in transfer applications while private colleges had a 4.7 percent increase. *UMass Dartmouth's transfer applications decreased by 4.7% in F19.*
- **Selectivity.** Colleges Accept Two-Thirds of First-Time Freshmen Applicants. The national average acceptance rate has increased from a low of 63.9 percent in Fall 2012 to 66.7 percent in 2017. *UMass Dartmouth's acceptance rate is 70%.*
- **Average Yield Rate for First-Time Freshmen Holds Steady After Long Decline:** The average yield rate for Fall 2017 was nearly identical to Fall 2016 (33.7 percent and 33.6 percent, respectively). Over the past decade the average yield rate has steadily declined from 48 percent in Fall 2007. *UMass Dartmouth's yield rate is 20.5%.*
- **Transfer Acceptance Rate Slightly Lower than Freshmen Rate;** Yield Much Higher: Among institutions that enroll transfer students, average selectivity for Fall 2018 was 61 percent, compared to 66 percent for first-time freshmen. However, more than half (52 percent) of transfer applicants who were admitted ultimately enrolled, compared to only 27 percent of freshmen admits. *UMass Dartmouth's transfer admit rate is 60%; yield rate is 54.2%.*
- **International Student Acceptance Rate is Low.** The average yield rate for international students was 29 percent. *UMass Dartmouth's international student yield is 20.1%.*
- Colleges employ a broad range of **strategies** when recruiting high school students. Sending email, maintaining institutional websites, and hosting campus visits were the primary means by which colleges recruited first-time freshmen for the Fall 2018 admission cycle. Four other factors—high school visits, direct mail, and outreach to both parents and high school counselors—were each rated as considerably important by at least 50 percent of colleges. *UMass Dartmouth employs several of the identified strategies to recruit first-time freshmen.*
- **Early Decision and Early Action Activity Increases:** Between Fall 2017 and Fall 2018, colleges reported an average increase of 11 percent in the number of Early Decision applicants and 10 percent in ED admits. The number of Early Action applications increased by 10 percent and the

number of students accepted through EA increased by 9 percent. *UMass Dartmouth's EA applications increased by 6.8%.*

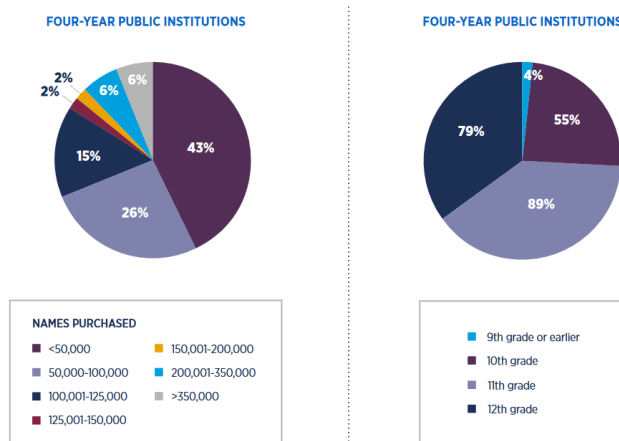
- **Factors that admission officers use to evaluate applications** from first-time freshmen have remained largely consistent over the past 20 years. Students' academic achievements—which include grades, strength of curriculum, and admission test scores—constitute the most important factors in the admission decision.
- **Admission Offices Identify Grades, High School Curriculum, and Test Scores as Top Factors for First-Time Freshmen:** The top factors in the admission decision were overall high school GPA, grades in college preparatory courses, strength of curriculum, and admission test scores.

Key Recruitment Strategy Trends

Reference: *2018 Marketing and Student Recruitment Report of Effective Practices, RNL, 2018*

In their 2018 report, Ruffalo Noel Levitz identified several key areas that four-year public institutions should incorporate as part of an effective recruitment and enrollment strategy. The following describes several of the key areas in use by UMass Dartmouth.

- **Student Search Practices.** UMass Dartmouth's use of Student Search to generate inquiries and applicants places it among the top 12 percent of four-year public institutions.



- **Preferred First and Subsequent Contact Method.** UMass Dartmouth's use of email, self-mailers and postcards is similar to other four-year public institutions. Texting and Digital Advertising have also been introduced and will continue to be expanded.

- **First Contact Source.** Purchased names, travel to high schools and college fairs and the application as first contact are the most identified first contact sources for four-year public institutions, including UMass Dartmouth.
- **Top Most Effective Outreach Strategies and Tactics.** Of the top five most effective outreach practices, UMass Dartmouth is utilizing publications, videos embedded on the website and a mobile responsive website. Digital advertising and texting have been introduced and are being expanded.
- **Advertising Strategies.** Among the advertising strategies identified as effective, UMass Dartmouth has initiated a strategy that incorporates re-targeted ads, pay-per-click, online display ads, and billboards.
- **Outreach to High School Counselors.** The report identifies 10 outreach strategies to high school counselors, and UMass Dartmouth utilizes all of these strategies to varying degrees.
- **Admissions Events.** UMass Dartmouth utilizes all of the top five admissions event activities with certain modifications.

Strategic Enrollment Plan Goals

The University's Undergraduate Strategic Enrollment Plan has been developed to outline the University's response to the market headwinds and plans to leverage market opportunities.

In order to increase new student undergraduate enrollment, the University must,

1. Build enrollments during a period of declining high school graduates and adult learners.
2. Increase market share within Massachusetts and expand geographic reach.
3. Improve the University's brand identity.
4. Remain competitive in terms of pricing.
5. Provide relevant academic offerings.
6. Allow students to earn multiple degrees through continuous enrollment options and competitive pricing (i.e. 3+1, 4+1, etc.)
7. Continuously review and revise content used in marketing across all platforms.
8. Utilize a CRM that provides the opportunity to adeptly communicate with prospective students and parents across multiple channels.
9. Increase faculty engagement in recruitment activities.
10. Improve relationships with professionals and organizations (high school counselors and community college advisors) who can feed students UMassD.

Plan Drivers

The primary plan drivers based on market conditions include the following.

1. State and regional demographics require an institutional response that **draws additional enrollments from declining pools of high school graduates and adult learners.**
2. The University's primary competitors are within the state of Massachusetts. The University must **increase its brand reach outside of the state in order to become a regionally recognized** University by a broader audience. This is key to increasing enrollment.
3. As an **increasing number of state universities in the New England region offer in-state tuition to out-of-state students**, or discount plans that offer this, **the advantages of the University's proximity rates diminish**, placing additional pressure on pricing.
4. **Marketing plans must be competitive and reach students across multiple channels** using varied platforms that deliver brand value propositions.
5. **Recruitment tools and teams must be adept.**

Plan Assumptions

The plan's key underlying assumptions are as follows.

1. A 5-year time frame moving forward is used for the purpose of developing action plans and projections.
2. The floor of headcount projections is based on historical conversion rates and a 1% annual growth assumption.
3. Each major will be categorized as one of the following:
 - a. Decline – market drivers indicate that headcount decline is likely with few opportunities to correct.
 - b. Hold – headcount is anticipated to remain steady with no increase and no decline.
 - c. Growth – headcount is anticipated to grow based on trend data and micro campaigns.
 - d. Establish – new program – headcount will be established through marketing and micro campaigns.
4. The plan will provide an overview of strategic initiatives and tactical plans to carry out these initiatives. Actions will include the following:
 - a. Broad-based brand marketing.
 - b. Targeting marketing based on one or more of the following:
 - i. Academic program
 - ii. Geography (state residency)
 - iii. Academic quality
 - c. Micro campaigns designed to influence very specific segment
5. Financial Aid Strategy, packaging methodology and proforma will be outlined.

Strategic Actions Summary

Demographics

Challenges with declines in traditional age high school graduates and adult learners requires the University to reassert its brand identity to increase its market share from a declining pool of prospects.

Goals

Increase market share within and outside of region through brand advertising, targeted direct and electronic communications, and connector cultivation.

Actions

1. Work with marketing on delivering brand value proposition messages to all audiences within the undergraduate recruitment segment. Audiences include:
 - 1) First-time freshmen
 - 2) First-time transfers
 - 3) Connectors (school counselors and college advisors)
2. Increase relationships with connectors who can refer students to UMassD.
 - 1) Develop (data mine) professional connects to be used in outreach/cultivation campaigns.
 - 2) Outreach campaigns (direct mail and email campaigns) to targeted high schools and community colleges.
 - i. Massachusetts
 1. UMassD On and Off Region in State
 - ii. Connecticut
 1. Specific targets as identified
 - iii. RI, VT, NH, ME
 1. Specific targets as identified
3. Schedule visits to targeted high schools, community colleges, and community agencies.
4. Attend selected College Fairs.
5. Develop cultivation campaigns targeting connectors who engage with one or more campaigns.

Geographic

The University has realigned the geographic targets from which it recruits to increase market share from each of those targets. Marketing channels and content are being aligned to enhance outcomes in these target markets.

Goals

1. Reinforce the UMassD brand within MA to reestablish and improve its competitive position among MA residents resulting in an increase in market share within MA.
2. Build brand in VT, NH, and ME and hold/increase market share.
3. Expand geographic reach and increase market share in CT, RI, NY, NJ, and PA
4. Begin cultivating interest in the 5 new geo targets.
 - a. Florida
 - b. Chicago
 - c. DC/Baltimore
 - d. Los Angeles
 - e. Houston/Dallas

Actions

1. Massachusetts

Build brand identity by making comprehensive name buys within the entire state of MA.
Increase name buys.

 - a. Junior Buys – NRCUAA.
 - b. Senior Buys – College Board, on-time and late test takers with admissible quality bands.
 - c. Branding & Segment Specific Drip Campaigns.
 - d. Digital Marketing.
 - e. Direct Mail.
 - f. Reestablish relationships with area school counselors and college advisors through personal outreach.
 - g. Create a connector (professionals who can/will refer students to UMassD) plan that includes drip campaign.
2. Out-of-State – New England
 - a. Build brand identity and strategically market to RI, CT, VT, NH, and ME.
 - b. Junior Buys – NRCUAA in select markets.
 - c. Senior Buys – College Board, on-time and late test takers with admissible quality bands.
 - d. Branding Drip Campaigns.
 - e. Digital Marketing aligned with visit and event schedules.
 - f. Direct Mail.
 - g. Build relationships with area school counselors and college advisors.
 - h. Align travel around target regions with quality highs schools.

3. Out-of-State – NY, NJ, PA
 - a. Build brand identity and strategically market to NY, NJ and PA.
 - b. Junior Buys – NRCUAA in select markets.
 - c. Senior Buys – College Board, on-time and late test takers with admissible quality bands.
 - d. Branding Drip Campaigns to specific target markets within regions.
 - e. Digital Marketing aligned with visit and event schedules.
4. New Geo Targets, Florida, Chicago, DC/Baltimore, Los Angeles, Houston/Dallas
 - a. Introduce and build brand identity to targeted name buys.
 - b. Direct mail and electronic drip campaigns to student name buys and data mined connectors (high school counselors).
 - c. Branding Drip Campaigns to specific target markets within regions.
 - d. Selective travel and outreach.

Academic Programs

Prospective freshmen and transfers use academic major as a primary search criterion when looking at colleges. Some students are also looking at majors that offer good employment or graduate school opportunities or for majors in emerging industry areas. To speak to these points, the University is bringing on new academic programs and realigning marketing efforts to increase yield from majors that are attractive in the market.

Goals

Leverage academic initiatives to help increase new student enrollment. This will be achieved by (1) adding new academic programs, (2) implementing a test flexible option, (3) enhancing marketing to programs slated for growth, and (4) increasing faculty engagement in recruitment/enrollment activities.

Actions

1. New Academic Programs – Marketing content is being developed for these new programs. Name buys will include these academic program clusters.
The University has added the following new academic programs:
 - a. Biology options: Conservation Biology, Cell and Molecular Biology, Ecology and Evolution Biology
 - b. Biomedical Engineering
 - c. Environmental Resources Engineering
 - d. Communications
 - e. Cyber Security
 - f. Fashion Design and Production
 - g. Health and Society
 - h. Interior Architecture and Design
 - i. Medical Laboratory Science
2. Implement test flexible option.
 - a. Identify name buys that reflect higher high school GPA's with lower SAT scores.
 - b. Purchase names through NRCUAA or CBSS to get in front of non-test takers.
 - c. Develop content that speaks to the test flexible option.
 - d. Inform connectors of test flexible option.
3. Enhancing marketing efforts to focus on majors slated for growth.
 - a. Under development
4. Faculty Engagement.
 - a. Special faculty-authored letters are currently in use in marketing content. This content will be enhanced with new authors and content.
 - b. Faculty are invited to participate in campus-wide enrollment events.
 - c. Faculty are asked to speak to and/or email prospective students and families upon request.
 - d. Faculty input is being solicited on the value propositions, outcomes, and unique stories that can be used in marketing content.

Transfer-Specific Actions

The University is taking action designed to increase the awareness of adult learners of their options to complete their undergraduate degree at UMassD. This is being achieved by increasing contact with lost inquiries and admits, reaching out to new community college enrollees through PTK buys, digital marketing, and cultivation of connectors.

Goals

Increase enrollment of transfer students by broadening the University's reach to adult learners through outreach to connectors and enhanced marketing.

Actions

1. Marketing to lost admits and inquiries.
 - a. Drip campaign is utilized to market to students who inquired and/or applied during the past 3 years.
2. PTK Buys are made of members who live in the state of MA.
3. Community College Initiatives
 - i. Articulation agreements and partnerships
 - ii. Relationship building with school advisors
 - iii. Connector drip campaign
4. Special Transfer visit days/ recruiting events
5. Attendance at transfer fairs
6. Digital marketing in specific geo targets

Travel

The efficiency of travel related to recruitment has been refined to better target prospective student markets. The University is also in the process of using marketing strategies ahead of scheduled travel, (i.e. sending emails or using digital marketing in geo target areas ahead of a college fair).

Goals

Use travel more strategically to cultivate interest and build relationships within the University's marketing geo targets for freshmen and transfers.

Actions

1. High School Counselor/Faculty Relations
 - a. High school visits to targeted high schools with good probability of referring admissible candidates within the University's geo marketing areas.
2. College Fairs
 - a. Attend high school college fairs in the geo target markets.
 - b. Special Transfer visit days/ recruiting events
 - c. Attendance at transfer fairs

Athletics

Athletics plays a critical role in both the recruitment and enrollment of new students as well as the retention of existing students.

Goals

Improve the policies and procedures used to project athlete headcount and strengthen the recruitment of athletes through continuous improvement of how Admissions works with Athletics.

Actions

1. Implement a new way to project athlete headcount, using the Athlete Projection Worksheet provided in this document.
2. Complete a review of the impact of athletes on (1) net revenue, (2) geo diversity, and (3) enrollment in academic programs. Use these data to create New Student Athlete Recruiting KPI.
3. Review Admissions-Athletics coordination strategies, including travel and visit coordination to increase the number of athletes visiting the University.
4. Review conversion rates of prospective athletes to identify opportunities for increasing conversion rates.

Financial Aid

Goals

The goals of the financial aid strategy are (1) support the marketing strategy through the use of admissions-based awards, (2) assist in increasing the engagement rate of prospective students upon acceptance, (3) offer a robust financial aid packaging policy that provides affordability to the student while generating the requisite net revenue to the University.

Actions

1. Continue making use of the pre-award strategy.
2. Utilize the financial aid proforma to assist with projection tuition discount rate and net revenue based on headcount projections.
3. Leverage out-of-state enrollment through the use of supplemental awards.
4. Leverage academic programs slated for growth through the use of supplemental awards.
5. Leverage identified wealth bands based on the FM expected family contribution through the use of supplemental awards.
6. Weekly monitoring of the following
 - 1) Number of awards by student segment, accepted, deposited, returning.
 - 2) Average discount rate by student type, accepted, deposited (freshmen and transfer) and returning upper-class students.

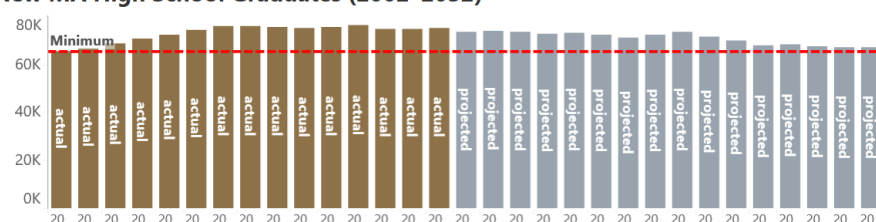
Demographic Impacts

First-Time Freshmen

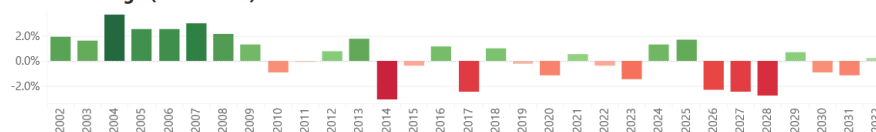
UMassD draws the majority (88.4% in Fall 2019) of its first-time freshmen and transfer enrollments from the state of Massachusetts. It is important for the University to increase its market share of Massachusetts students but also achieve incremental growth from out of state.

The number of Massachusetts high school graduates is projected to continue to be strained until the years 2024 and 2025 when a slight increase will occur followed by three years of decline.

New MA High School Graduates (2002–2032)



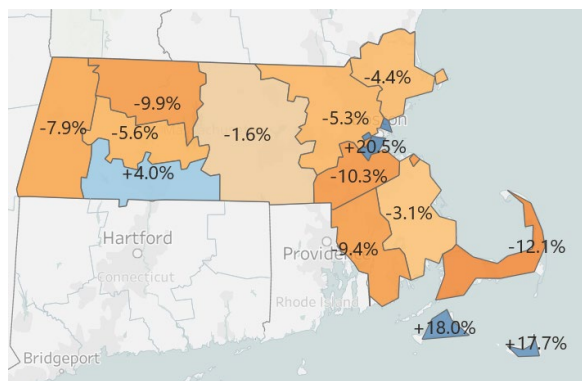
Annual % Change (2002–2032)



Source: Western Interstate Commission on Higher Education, "Knocking at the College Door: Projections of High School Graduates Through 2032." <https://knocking.wiche.edu/>

The UMass Donahue Institute projects declines in traditional age college-going population in most regions within Massachusetts. While all counties will need to be targeted, specific strategies to leverage enrollments from counties with lower declines or increases will provide opportunity to increase overall market share from the state.

Population Change Age 15-24 by County 2020-2035



First-Time Transfer (to UMassD)

Enrollments at most community colleges nationally are declining. Among the reasons are the declining birth rate, creating fewer high school graduates as well as the current low unemployment rate. For example, New York state's 31 community colleges have lost an average of 23 percent of enrolled students between 2010 and 2019 (source: State University of New York).

Data available from the Massachusetts Department of Higher Education (DHE) clearly shows that the number of adult learners in the state is in decline. This decline combined with enhanced efforts to enroll adult learners by colleges and universities, including both online and on-the-ground programs, means that this market will remain highly competitive.

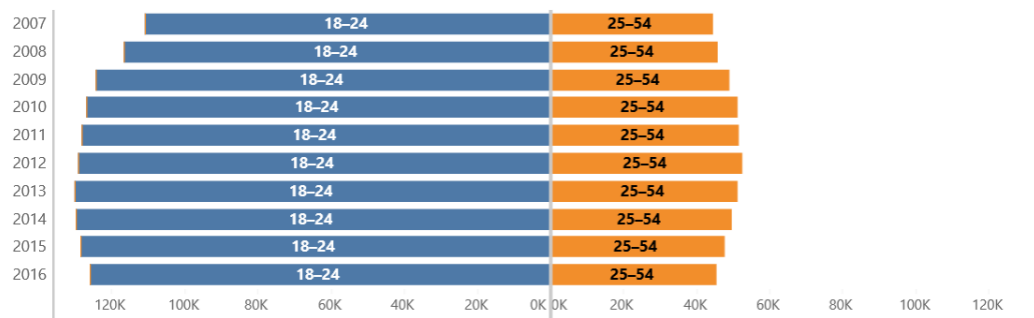
Adult Learner vs. Traditional Age Enrollment

In the past 10 years, adult learners have made up a smaller share of the undergraduate student population than their younger peers, and their enrollment declines have been steeper. Thirty years ago, adult learners made up a much larger share of the population.

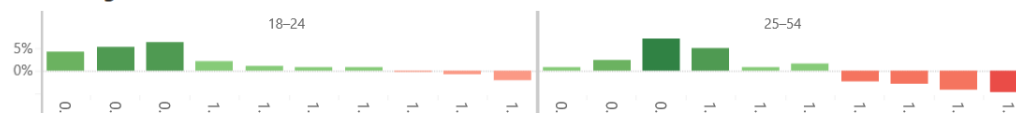
Select a Trend Range

10-Year Trend

Undergraduate Enrollment By Age Group (10-Year Trend)

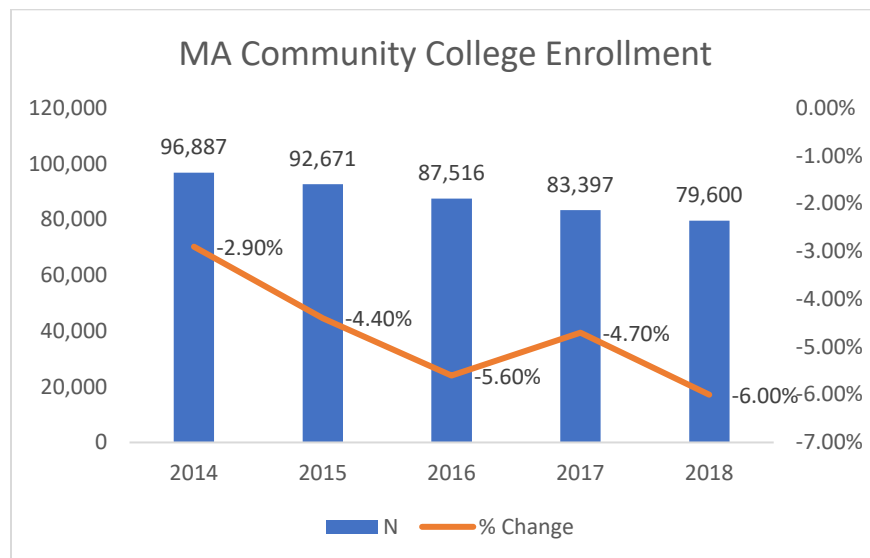


Annual % Change (10-Year Trend)



Source: Massachusetts Department of Higher Education.

A substantial portion of transfer enrollments have historically come from area community colleges. Massachusetts DHE enrollment data shows that community college enrollment in Massachusetts has declined by 23.6% representing a loss of 17,287 students. This places clear pressure on the University to cultivate more share from a declining community college transfer market and to build market share from the non-community college transfer market.



Source: MA DHE Data Center, retrieved on 1/9/20,
<https://www.mass.edu/datacenter/2018enrollmentestimates.asp>

Competitor Impacts

The University faces strong competition from institutions within the state of Massachusetts.

Clearinghouse Data

2019 Clearinghouse data provides competitor information from admitted applicants who chose another institution. The following institutions reflect the University's top 10 admitted student overlap institutions.

1. UMass Boston
2. UMass Amherst
3. UMass Lowell
4. Bridgewater State
5. University of Rhode Island
6. Wentworth Institute of Technology
7. Framingham State
8. Westfield State
9. Salem State
10. Rhode Island College/U Maine Orono

Enrollment Planning Service Data

Enrollment Planning Service (EPS) competition data within top geo markets, based on largest number of SAT overlap provides additional competitor information:

1-5 SAT Overlap Rank	6-9 SAT Overlap Rank
UMass Amherst	Salem State
UMass Boston	Northeastern University
UMass Lowell	University of NH
University of RI	Boston University
Bridgewater State	

Top 5 Competitors for each UMass Dartmouth College, Fall 2016-2019

College/Rank	1	2	3	4	5
CCB	UMass Amherst	UMass Boston	UMass Lowell	Bridgewater State	Bryant University
CAS	UMass Boston	UMass Amherst	Bridgewater State	UMass Lowell	URI
COE	UMass Lowell	UMass Amherst	Wentworth	UMass Boston	URI
CONHS	UMass Boston	UMass Lowell	Worcester State	UMass Amherst	URI
CVPA	Mass Coll Art and Design	Lesley University	Bridgewater State	UMass Lowell	UMass Amherst

Program-level information is important as we develop specific messaging based on top competitors for these programs:

Major	1	2	3	4	5
Biology	UMass Amherst	UMass Boston	URI	University of NE	University of Maine
Crime and Justice	Bridgewater State	UMass Boston	Westfield State	UMass Lowell	Framingham State
Psychology	UMass Boston	Bridgewater	UMass Amherst	UMass Lowell	Salem State

University Response

Given that the majority of the University overlap institutions are public, and in general have similar price points except for community colleges, the University's strategy must include the following:

1. Marketing that
 - a. Improves the University's brand value among medium and large public institutions to MA and RI Students.
 - b. Articulates the "value" and affordability of UMassD's price point across all prospective student populations.
 - c. Articulates that the value of UMassD is equal to or greater than private institutions.
2. Academic program information for institutional and academic major overlaps will be data mined to better understand how UMassD compares to these schools. This market intelligence will inform how to better articulate the competitive position of UMassD as an institution as well specific academic programs.

Market Pricing Impacts

Full-year Direct Costs for In-State Massachusetts residents at competitor institutions

Institution	Tuition & Fees	Room & Board	**% On-Campus	Total
UMass Dartmouth	\$14,358	\$14,647	52%	\$29,005
UMass Boston	\$14,167	\$15,270	10%	\$29,437
UMass Amherst	\$16,784	\$14,006	62%	\$30,790
UMass Lowell	\$15,648	\$13,060	32%	\$28,708
Bridgewater State	\$10,732	\$13,300	40%	\$24,032
*University of Rhode Island	\$24,009	\$12,688	40%	\$36,697
Wentworth Institute	\$34,970	\$14,526	48%	\$49,496
Framingham State	\$11,100	\$12,226	47%	\$23,326
Westfield State	\$10,849	\$14,331	48%	\$25,180
Salem State	\$11,284	\$13,056	28%	\$24,340
Rhode Island College	\$13,688	\$13,432	14%	\$27,120
University of Maine Orono	\$17,338	\$10,966	40%	\$28,304

*proximity rate

** Source: collegeboard.org

- Forty-nine percent of UMass Dartmouth's entering freshmen have an Expected Family Contribution (EFC) of \$5,576 or less. This family economic reality along with the significant percentage of our students who reside on campus (only Amherst has a higher percentage) makes our students' ability to afford their education unique among our sister UMass campuses and requires us to provide additional financial assistance to offset their residential expenses.

University Response

Competitive pricing of public competitors and high discounting by private competitors impacts the University's market advantage. The University will work to strengthen its value proposition and differentiate itself down to the program level against its competitors to allow the decision point for prospective students to move beyond simply price.

Headcount Projections

For Budgeting Purposes the University is projecting flat FTE enrollment.

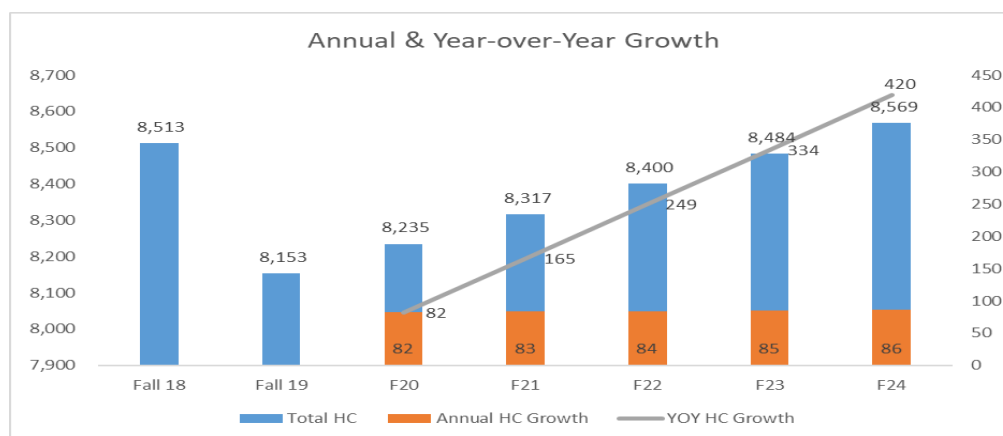
	Actual	FTE Budget Projections				
Year	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025
Undergraduate Total	5,261	5,105	5,106	5,106	5,106	5,106
Graduate Total	559	511	512	512	512	512
Continuing Ed Total	279	256	255	255	255	255
Online Only	625	700	700	700	700	700
Law School Total	247	276	283	288	301	316
Grand Total	6,970	6,848	6,856	6,861	6,874	6,889
% Growth		-0.018	0.00	0.00	0.00	0.00

Headcount Projections

Assumptions. To establish the floor for enrollment growth, a 1% headcount inflation factor across all divisions was used for each of the 5 years moving forward. The net result is an increase in total headcount of 420 by year 5.

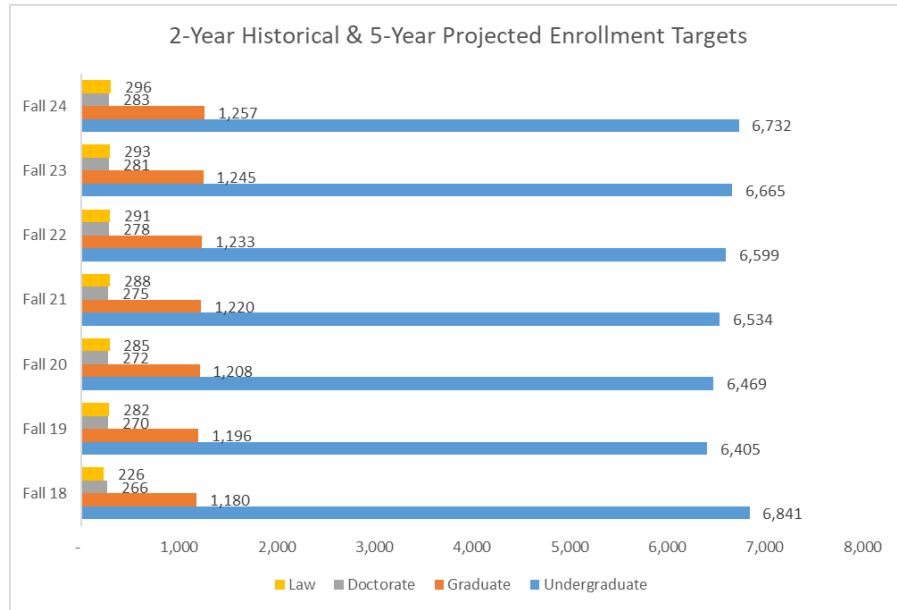
Chart A shows the growth in headcount each year and the year-over-year growth over 5 years. Chart B shows the growth by division.

Chart A - Aggregate Headcount Projections Across All Divisions



Aggregate by Division

Chart B - Headcount Projections Division



Aggregate by Division & Type

Chart C shows headcount projections by division and type.

Chart C – Headcount Projections by Division & Type

Division	Type	Fall 19	Fall 20	Fall 21	Fall 22	Fall 23	Fall 24
UG	new	1,929	1,948	1,968	1,987	2,007	2,027
	continuing	4,304	4,347	4,391	4,434	4,479	4,524
	re-admit	172	174	175	177	179	181
Grad	new	443	447	452	457	461	465
	continuing	981	990	1,000	1,011	1,021	1,031
	re-admit	42	42	43	43	44	44
Law	new	113	114	115	117	117	119
	continuing	169	171	173	174	176	177
	re-admit	-	-	-	-	-	-

First-Time Freshmen and Transfer by College

The increased new freshmen and transfer enrollment will be accomplished through the prospect/lead generation, inquiry development, application development, and acceptance to deposit plan(s) outlined in this report.

Projected Freshmen Headcount by College

College	Fall 20	Fall 21	Fall 22	Fall 23	Fall 24
A&S	647	654	660	667	674
CCB	206	208	210	212	214
COE	261	263	266	269	271
CON&HS	137	138	140	141	143
CVPA	79	80	80	81	82
Total	1,330	1,343	1,356	1,370	1,384

Projected Transfer Headcount by College

College	Fall 20	Fall 21	Fall 22	Fall 23	Fall 24
A&S	184	186	188	189	191
CCB	159	160	162	163	165
COE	45	46	46	47	47
CON&HS	59	59	60	60	61
CVPA	39	40	40	41	41
Total	486	491	496	501	506

GEO Targets

Regional GEO Targets

In-State

The University will continue to look to increase its market share within Massachusetts. The focus will be on the counties of Bristol, Essex, Middlesex, Norfolk, Plymouth, and Worcester. New freshmen enrollment by county projections:

County	F19	F20	F21	F22	F23	F24
Bristol	436	440	445	449	454	458
Essex	59	60	60	61	61	62
Middlesex	111	112	113	114	116	117
Norfolk	104	105	106	107	108	109
Plymouth	162	164	165	167	163	170
Worcester	108	109	110	111	112	114
Total	980	990	1000	1010	1020	1030

New England

The University will continue to look to increase enrollment within New England. New freshmen enrollment projections:

State	F19	F20	F21	F22	F23	F24
Connecticut	27	27	28	28	28	28
Maine	1	1	1	1	1	1
New Hampshire	10	10	10	10	10	11
Rhode Island	43	43	44	44	45	45
Vermont	5	5	5	5	5	5
Total	86	87	88	89	89	90

National GEO Targets

The chart below shows current experience with enrollment of first-time freshmen and transfers.

Recent Enrollment Trends (Freshmen and Transfers)

State	Fall 2017		Fall 2018		Fall 2019	
	Freshmen	Transfers*	Freshmen	Transfers*	Freshmen	Transfers*
Connecticut	18	10	30	9	29	4
Maine	1	3	4	87	4	5
New Hampshire	5	8	5	9	10	9
Rhode Island	34	32	44	22	48	39
Vermont	1	4	2	1	5	2
Total	59	57	85	48	96	59

*Transfers are out-of-state residents; however, state of current state of residency may not be accurate, as state is attributed to location of high school where resident graduated.

New England Enrollment Projections (Freshmen and Transfers)

State	Fall 2020		Fall 2021		Fall 2022		Fall 2023		Fall 2024	
	Freshmen	Transfers	Freshmen	Transfers	Freshmen	Transfers	Freshmen	Transfers	Freshmen	Transfers
Connecticut	30	4	30	4	31	5	31	5	32	5
Maine	4	5	4	5	4	5	5	5	4	5
New Hampshire	10	9	11	10	11	10	11	10	11	10
Rhode Island	48	39	48	40	49	40	9	42	50	42
Vermont	5	2	5	2	5	2	5	2	5	2
Total	97	59	98	61	100	62	101	64	102	64

Middle Atlantic

The University will look to enroll students from the Middle Atlantic Region. New freshmen enrollment projections:

State	F19	F20	F21	F22	F23	F24
New Jersey	3	4	5	6	7	7
New York	6	7	8	9	10	11
Pennsylvania	3	4	5	5	6	6
Virginia	2	2	2	3	3	3
Total	14	17	20	23	26	27

National

The University will look to enroll students from National Region(s) with particular focus on select states. New freshmen enrollment projections:

State	F19	F20	F21	F22	F23	F24
California	2	3	4	4	5	5
Florida	1	2	3	3	4	4
Metro Chicago	0	1	2	2	3	3
Texas	0	1	2	3	3	3
All Other	9	9	10	10	10	10
Total	12	16	21	22	25	25

First-Time Undergraduate Transfer Enrollment

The expansion of partnerships with our feeder community colleges will be central to maintaining and/or growing transfer enrollment over the period.

New Transfer Enrollment

CC College	Modality	F19	F20	F21	F22	F23	F24
Bristol CC	Face to Face	135	136	138	139	140	142
	online	51	52	52	53	53	54
Cape Cod CC	Face to Face	22	22	22	23	23	23
	online	3	3	3	3	3	3
Massasoit	Face to Face	23	23	23	24	24	24
	online	6	6	6	6	6	6
All Other	Face to Face	158	160	161	163	164	166
	online	83	84	85	86	86	87
Total	Face to Face	338	341	345	348	352	355
	online	143	144	146	147	149	150

University Response

In December 2018, an MOU was signed with Bristol Community College creating the Plus Program: Bristol. This program is open to their students who complete an associate degree, and provides collaborative on-site academic advising and access to a variety of UMass Dartmouth experiences. The Plus Program: Cape Cod Community College will be created, and outreach has been made to Massasoit Community College about a potential partnership. Through expanded partnerships UMass Dartmouth will be front and center for these students as they consider their next academic path.

Travel

Recruitment travel in the Fall occurs from September through November, visiting high schools to meet with students and counselors, and attending college fairs and college nights. Spring travel occurs from mid-February through early May focusing on building the prospective student pool for the next applicant cycle. Similar to the Fall, admissions counselors will visit high schools and attend college nights and college fairs.

Recruitment territories are assigned to admissions counselors and they are responsible for their territories through prospect, inquiry, application, and enrollment stages.

In-State- Territories are assigned using the College Board Enrollment Planning Service (EPS) segmentations. While representation throughout the state is attempted, particular emphasis is placed on the select counties including Bristol, Essex, Middlesex, Norfolk, Plymouth, and Worcester. Inquiry, application and enrollment data informs the outreach efforts in these areas.

New England –Territories are assigned using the College Board Enrollment Planning Service (EPS) segmentations. Three admissions recruiters share the responsibility of covering Connecticut, Rhode Island, Southern New Hampshire and Maine. Inquiry, application and enrollment data informs the outreach efforts in these areas.

Middle Atlantic – Recruitment in New Jersey, New York, and other areas within this region are shared among the admissions staff members. Inquiry, application and enrollment data informs the outreach efforts in these areas. Recruiters assigned to areas within this region are responsible for prospective students throughout the application cycle.

National – Recruitment in Southern California, Greater Houston, Texas, metro Chicago, and southeastern Florida is shared among admissions staff members. Inquiry, application, and enrollment data informs the outreach efforts in these areas.

Academic

Test Optional/Flexible Program

Test Optional/Flexible Program was introduced as a pilot in Fall 2019. The Colleges of Business and Visual and Performing Arts agreed to participate in this option. For Fall 2020, programs in the College of Arts and Sciences, excluding Biology and Chemistry, will consider applicants with a 3.0 GPA or higher who choose to not submit SAT or ACT test scores during their application process. The decision to allow students the option of submitting standardized test scores within the admissions process gives students the autonomy to decide what information they believe best represents their qualification for admission to UMass Dartmouth.

Fall 2019 Test Optional Application Summary

College	Applied	Admit	Enroll	Admit Rate	Yield
Charlton College of Business	211	125	21	.59	.17
College of Visual and Performing Arts	97	38	10	.39	.26

Test Optional Enrollment Projections

College	F19	F20	F21	F22	F23	F24
Charlton College of Business	21	23	24	25	25	25
College of Visual and Performing Arts	10	12	13	14	15	15
College of Arts and Sciences		63	64	65	65	65

Academic Program Initiatives

New Undergraduate Program Contribution to Enrollment

Between Fall 2018 and the present, the programs below have been added in support of enrollment.

Face to Face

- Biology options: Conservation Biology, Cell and Molecular Biology, Ecology and Evolution Biology
- Biomedical Engineering
- Environmental Resources Engineering
- Communications
- Cyber Security
- Fashion Design and Production
- Health and Society
- Interior Architecture and Design
- Medical Laboratory Science

New Program Contribution to Headcount

Academic Program	Fall 18	Fall 19	Fall 20	Fall 21	Fall 22	Fall 23	Fall 24
Bio Concentrations	0	0	5	10	15	15	15
Biomedical Engineering	0	1	5	10	15	15	15
Environmental Resources Engineering	0	0	5	5	5	5	5
Communications	0	0	0	10	15	20	25
Cyber Security	0	0	5	5	5	5	5
Fashion Design and Production	0	0	5	10	15	15	15
Health and Society	0	12	15	20	25	25	25
Interior Architecture and Design	0	0	5	10	15	15	15
Medical Laboratory Sciences	18	15	20	25	30	35	40
Total	18	28	65	105	140	150	160

Arts and Sciences Strategy

With the decline of interest in the liberal arts nationally, particularly within the social sciences and humanities, as well as the questioning of the value of a four-year degree in the public domain for these programs, the University in conjunction with the College of Arts and Sciences (CAS) will

- **Work with faculty, Marketing, and Alumni Affairs** to identify:
 - Top 3 talking points on why prospective students should choose our program over a competitor's program.
 - Identify successful alumni from programs if possible, to reinforce the opportunities and outcome potential for their program. Work with faculty and Alumni Office.
 - Identify current students we wish to profile for testimonials and potential video production to provide prospective CAS students with reasons why they chose UMassD and the interesting opportunities they have taken advantage of. Work with CAS staff, faculty, Marketing, and Admissions.
- **Support the Bristol Plus Program** working with Undergraduate Admissions, and the New Student Transfer Office to promote CAS options and build continuity for these students in the pipeline.
- The strategy(s) will require **significant assistance and involve faculty, CAS staff, Marketing, Decision & Support Initiatives, Office of Alumni, and Undergraduate Admissions.**
- Example areas for **potential new student enrollment growth within CAS** include Biology concentrations, Psychology, Crime and Justice Studies, Health and Society, and Pre-Law, which have currently been identified for specific targeted growth. The creation of a Pre-Science track within CAS for first-time freshmen is also expected to add new enrollment.
- **The Honors College** offers a strong opportunity to increase the number and quality of new CAS enrollment and should improve our yield of academically talented students.
- Additional examples of **promotable opportunities** that add value for students choosing CAS include Semester in the City, our 4+1 programs, and 3+3 Law with UMass Dartmouth Law.

Athletics

The enrollment of new athletes is critical to both new student enrollment and retention. The discount rate of athletes also has a substantial impact on the University's overall discount rate. The chart below shows the estimated average tuition discount and net tuition revenue by team.

Net Revenue Impact

Tuition Discount Rate and Net Tuition Revenue by Team

Sport	Upper Class Standing					Freshmen Standing					Total - All Athletes				
	N	EFC	Family Income	Tuition Discount Rate	Net Tuition Revenue	N	EFC	Family Income	Tuition Discount Rate	Net Tuition Revenue	N	EFC	Family Income	Tuition Discount Rate	Net Tuition Revenue
Baseball	25			24%	323,049	12			33%	139,398	37			27%	462,447
Equestrian	6			31%	71,054	2			30%	31,289	8			31%	102,343
Football	42			40%	440,372	49			42%	511,113	91			41%	951,485
Field Hockey	14			39%	144,204	2			50%	14,495	16			40%	158,699
Golf	4			9%	53,380	5			38%	45,013	9			25%	98,393
Ice Hockey	18			25%	314,425	10			18%	210,427	29			21%	555,883
M Basketball	9			33%	98,628	3			40%	25,988	13			33%	135,972
M Indoor Track	27			31%	279,048	19			33%	195,040	46			32%	474,088
M Lacrosse	16			23%	203,164	18			34%	231,157	34			29%	434,321
M Soccer	16			24%	177,757	7			25%	79,996	24			23%	273,461
M Swimming	11			28%	151,672	7			31%	80,152	18			29%	231,824
M Tennis	10			24%	112,342	3			22%	47,165	13			23%	159,507
M X-Country	8			32%	80,809	7			34%	70,321	15			33%	151,130
Softball	15			43%	157,892	6			38%	73,315	22			41%	250,309
Sailing	6			36%	65,395	6			25%	65,177	12			31%	130,572
Volleyball	9			28%	164,202	9			37%	91,622	18			31%	255,824
W Basketball	7			30%	85,799	3			48%	30,300	10			36%	116,099
W Indoor Track	27			31%	320,481	11			48%	82,774	38			35%	403,255
W Lacrosse	16			51%	114,759	6			32%	62,445	22			45%	177,204
W Soccer	17			29%	216,580	7			50%	50,580	24			34%	267,160
W Swimming	9			44%	95,719	6			41%	59,951	15			43%	155,670
W Tennis	8			23%	84,308	5			58%	31,074	13			37%	115,382
W X-Country	10			22%	131,693	1			20%	11,426	11			22%	143,119
Total Athletes	330			32%	3,886,732	204			36%	2,240,218	538			33%	6,204,147

Headcount Impact & Projection

Enrollment and Athletics are coordinating efforts to improve how the new and returning athlete headcount is projected. This requires upgrades in reporting of how many enrolled athletes will persist from year to year so that the number of new athletes required by team can be calculated.

The following headcount projection worksheet is being used to calculate the number of enrolled and new athletes.

Headcount Projection Worksheet

Sport	Roster Size Calculations							Projected New Required			
	Recommended Roster Size	Current N	Variance Against Target	Projected Retention %	Projected Returners	Required New	Target Roster Size	Projected New Melt	Target New	New Athlete Melt	Enrolled New
Baseball	34										
Equine	12	7	-5								
Football	94	94	0								
Field Hockey	20	18	-2								
Golf	9	9	0								
Ice Hockey	29	29	0								
M B-Ball	15	13	-2								
M Indoor	45	45	0								
M Lacrosse	28										
M Soccer	25	26	1								
M Swim	19	19	0								
M Tennis	13	13	0								
M X-Country	14	14	0								
Softball	24		-24								
Sail (Co-Ed)	8	8	0								
W B-Ball	14	10	-4								
W Indoor	30										
W Lacrosse	21										
W Soccer	28	26	-2								
W Swim	14	14	0								
W Tennis	13	13	0								
W Volleyball	18	18	0								
W X-Country	11	11	0								
Total Athletes											

Key

Item	Description
Recommended Roster Size	The ideal size of the roster that is needed to build the team.
Current N	The current size of the roster (may be greater or less than the recommended roster size).
Variance	Variance between Recommended Roster Size & Current N
Projected Retention %	Percent of current athletes are anticipated to return (retained)
Projected Returners	Current N times the Projected Retention %
Required New	Based on projected returners, how many new N are needed to fill the roster?
Target Roster Size	Desired total number of athletes needed to achieve the recommended roster size based on anticipated melt
Projected New Melt	Anticipated melt Percentage
Target New	Gross Number of new Athlete recruits
New Athlete Melt	N number of new athletes melted
Enrolled New	N number of athletes actually enrolled

State Distribution

Athletes also contribute to the University's geo diversity. The chart below shows the states from which athletes come according to sport.

State Distribution of Athletes

	Sport																							
state	Baseball	Equine	Football	Field Hockey	Golf	Ice Hockey	M B-Ball	M Indoor	M Lacrosse	M Soccer	M Swim	M Tennis	MX-Country	Softball	Sail	Volleyball	WB-Ball	W Indoor	W Lacrosse	W Soccer	W Swim	W Tennis	WX-Country	Total(s)
AL						1																		1
CA						3								1	1	2								7
CO						1		1																2
CT	3	2	12			1			4		1	1		1		1	2	3		1	4			36
DC							1																	1
GA			1																					1
HI																				1				1
IL						1																		1
IN						1																		1
MA	31	8	63	19	9	7	12	48	26	25	17	14	20	18	15	13	8	43	29	25	15	20	15	500
ME				3							2			3										8
MI														2										4
NH	1	1	2			1					1					1					2			9
NJ	2			1		2			1							1		1		1				9
NY						5			4		1			2		2								14
OH																		1					1	2
OR						2			2															4
PA			1			1																		2
RI	3		22					4	1	1			1				1	3	1	2				39
SC						1																		1
TN						1																		1
TX																1								1
VT																								0
WA														1										1
CAN						1								1										1
SWE						1																		1
																								0
																								0
																								0
																								0
																								0
																								0
																								0
Total	37	9	101	23	9	30	12	52	38	26	22	15	21	28	16	21	11	51	30	30	23	20	16	648

Financial Aid Strategy

The University employs a combination need-based and merit-based financial aid strategy. Recipients are packaged based on their need. The current merit-based awards were adopted in Fall 2018 and continue to date.

Admissions-Based Fund Types

Category	Freshmen Award Range	Transfer Award Range
Chancellor's	\$4,000-\$7,000	\$5,000
Dean's	\$4,000	\$3,000-\$4,000
Admissions'	\$2,500-\$4,000	\$2,000
New England Rate (Freshmen and Transfers)	\$10,597	
PTK Chancellor's Transfer Scholarship		\$6,000

Financial aid strategies are continuously assessed, and new initiatives are developed. For example, a New England rate was adopted in Fall 2018 as a strategy to attract and compete for enrollment of students from Connecticut, Maine, New Hampshire, Rhode Island, and Vermont.

Goals

1. Continue to award base amounts of admissions-based matrix awards and need grant.
2. Target 3 groups slated for growth
 - a. (1) based on major (specialty majors)
 - i. Biology (BIO), Marine Biology, Psychology (PSY), Crime and Justice (CJS-BA CJS-BS), Interior Architecture and Design (IDA), Fashion Design and Production (AXDFD-BFA), Marketing (MKT), Bioengineering (BNG-BS) , Data Science (DSC)
 - ii. Out of state / out of proximity and (those who pay higher rates of tuition and can help reduce discount even with some modest incentive)
 - iii. (3) low conversion EFC ranges

Packaging Groups

Students will fall into one of 4 packaging groups. Packaging group will be determined at the time of admissions and FAFSA receipt and cannot be changed once the initial award has been made. The four packaging groups are as follows:

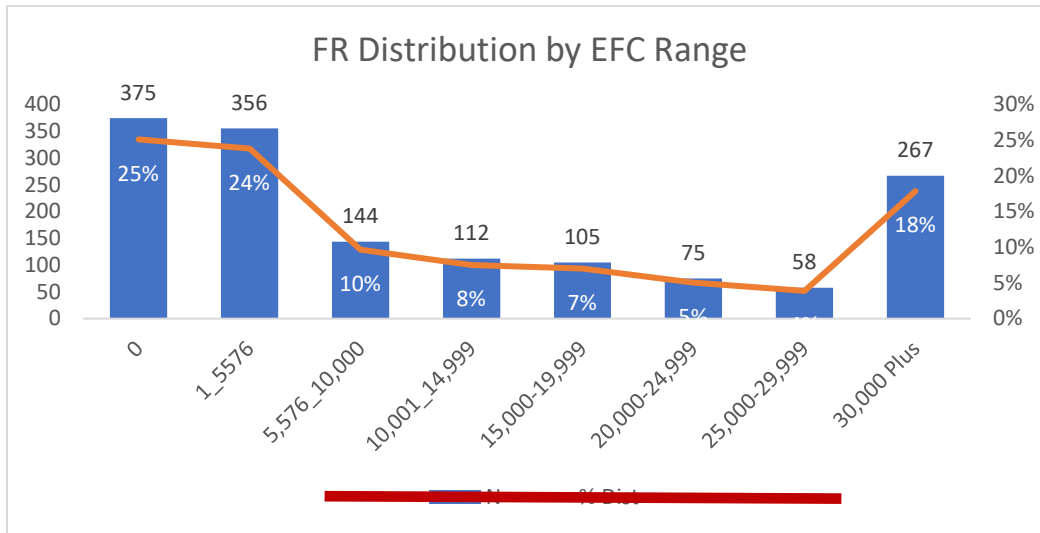
1. Standard Packaging Group – Students who do not fall into one of the Target Groups listed below.
2. Target Group A
 - a. Majors targeted for growth: package at 35% UMassD discount
2. Target Group B
 - a. Students from out of state and out of proximity: package at 35% UMassD discount
3. Target Group C
 - a. Students do not fall in Target Group A and/or B with EFC ranges between \$10,000 and \$29,999
 - i. 10,000-29,999: \$2,000 supplement

Packaging Policy Priority

If student meets more than one of the Target Group criteria, the packaging priority is as follows:

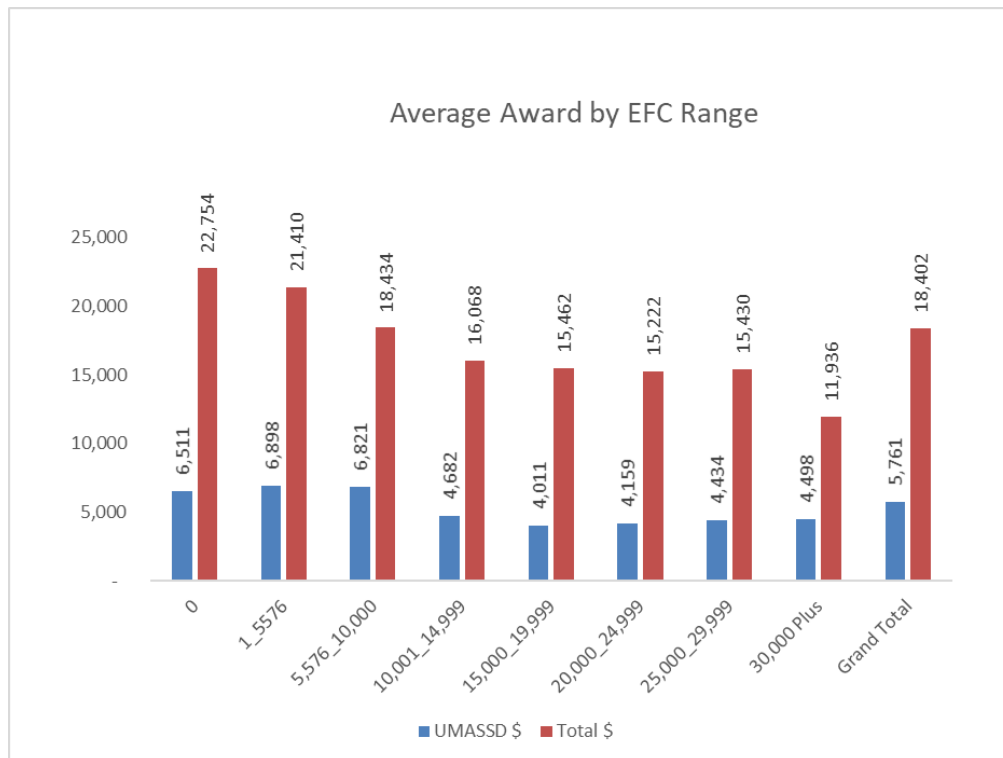
Target Groups	A	B	C	Package Policy
Scenario 1	A			A
Scenario 2	A	B		A
Scenario 3	A	B	C	A
Scenario 4		B	C	B
Scenario 5			C	C
Standard	Null	Null	Null	Standard

Percent Distribution by EFC Range – Enrolled Freshmen

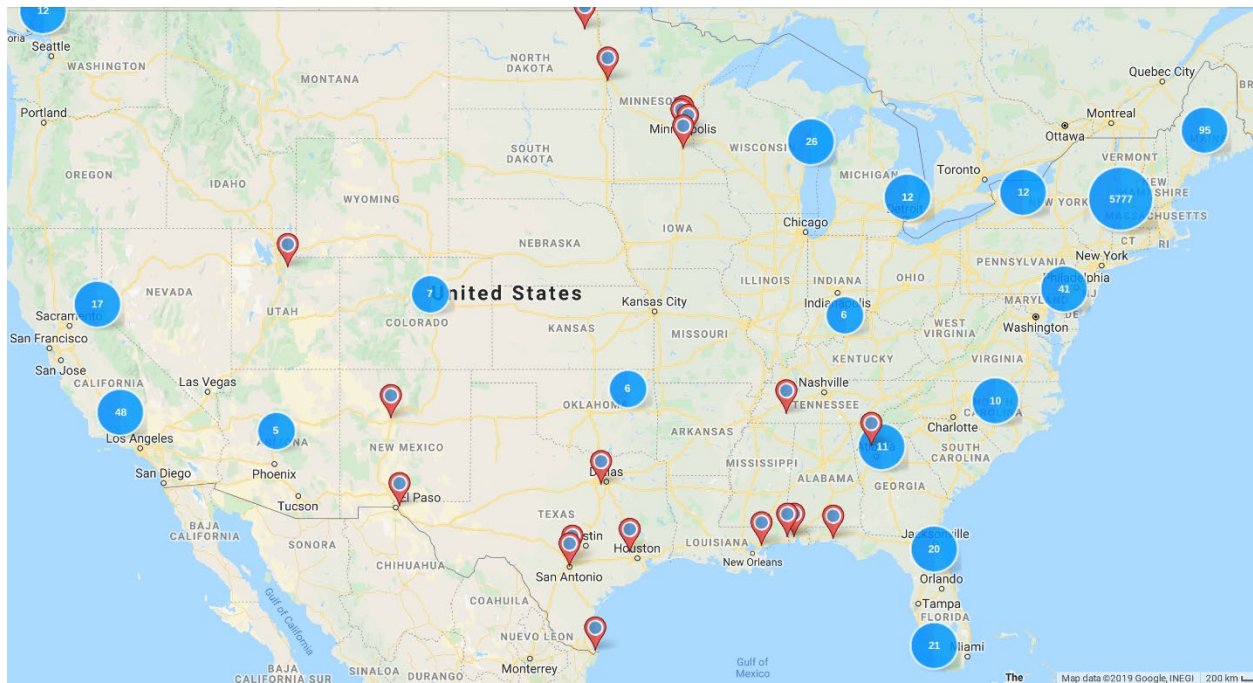


Forty-nine percent of UMass Dartmouth's entering freshmen have an Expected Family Contribution (EFC) of \$5,576 or less making our students' ability to afford our education unique among our sister UMass campuses.

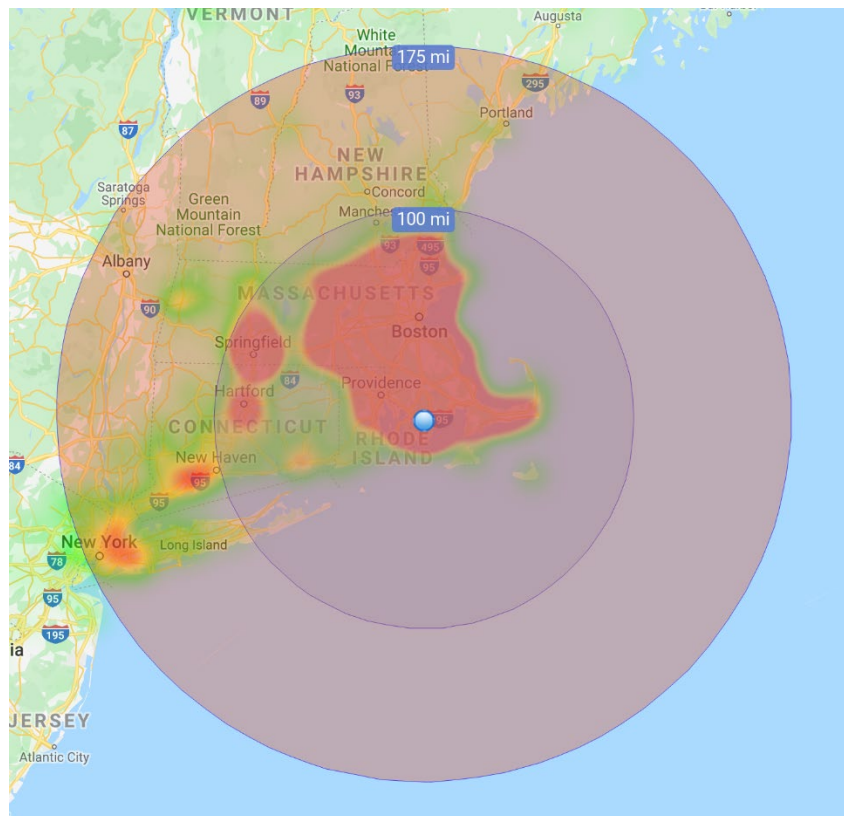
Average Award by EFC Range – Enrolled Freshmen



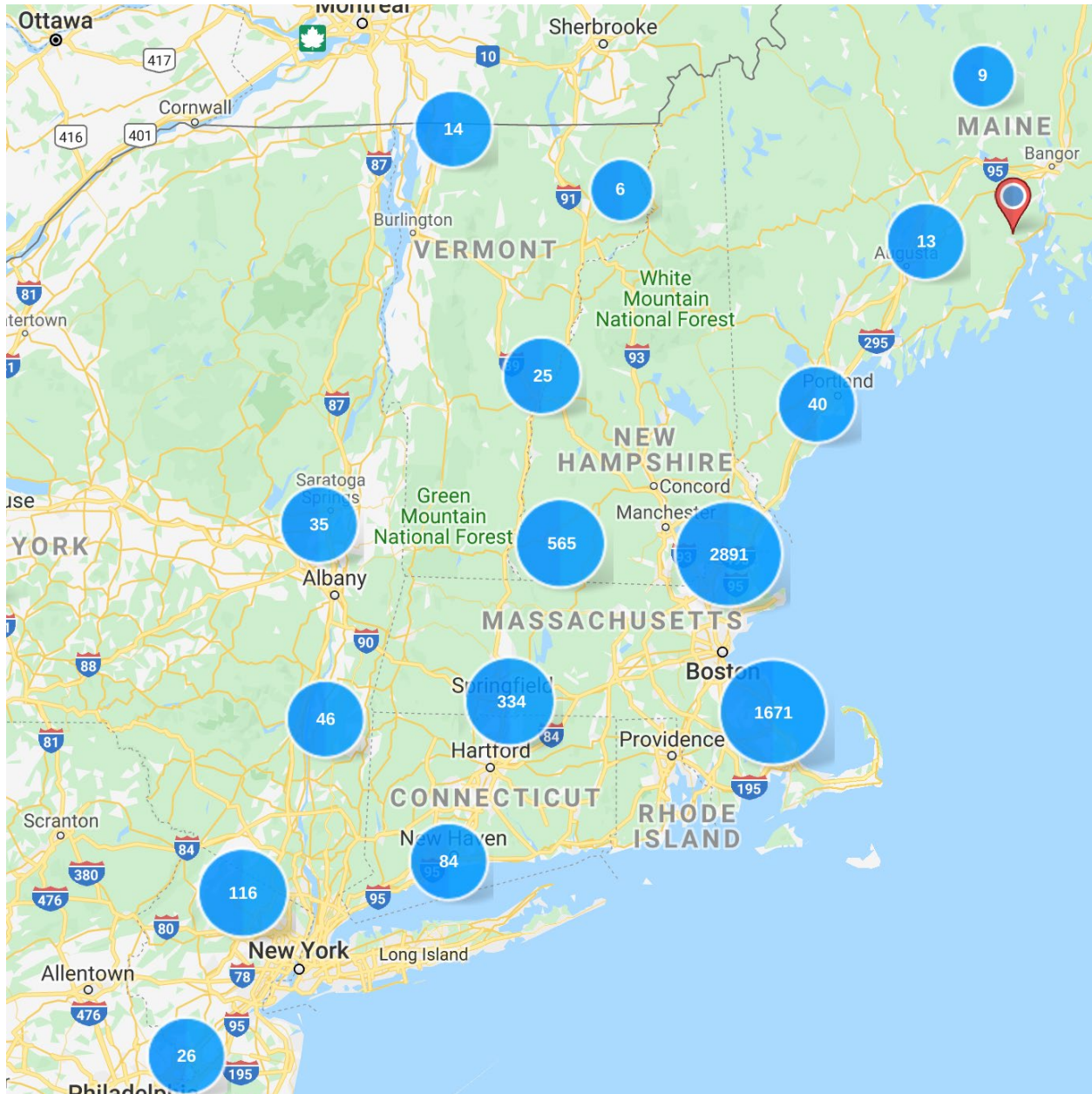
Non-Deny Non-Enrolled National View



Non-Deny Non-Enrolled Northeast View Heatmap 100 / 175 Mile Radius



Non-Deny Non-Enrolled Northeast View - N



Marketing Initiatives

Primary Communications Channels

The following chart shows the primary communications channels used to communicate with students.

Audience	Communications Channel								
	Website	Direct Mail	Email Drip	Digital Adv	Ad Buy	Instagram	Social Media	Visit	Fair/Event
FT FR	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
FT TR	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙	⊙
HS SO/JR	⊙		⊙						
Parents	⊙		⊙						
HS Counselors	⊙	⊙	⊙						
HS Coaches	⊙		⊙						
FT TR CC	⊙		⊙	⊙	⊙	⊙	⊙		⊙
FT TR 4-year	⊙	⊙	⊙	⊙	⊙	⊙	⊙		⊙
Special Audiences		⊙	⊙						
Connectors		⊙	⊙						

Marketing Audiences-Interest Cultivation

This section provides an outline of the primary new first-time freshmen and first-time transfer marketing audiences, the source from which each audience is developed, and the cost of securing the audience.

The University has identified the following as primary target audiences to market to for the purpose of recruiting first-time freshmen and first-time transfer students. The target audience is provided followed by the source from which the audience is developed.

The cost reported reflects the cost of purchasing or using the prospect list only and does not include any marketing costs. *Note: The cost associated for sources coded NA have been accounted for within a previous source.*

First-Time Freshmen

High School Seniors

Sources	Current Cost
SAT Name Buys	\$75,000
Previously Cultivated Soph/Junior HS Students	NA
ACT NRCCUA Name Buys	\$28,500
High School Visits	\$85,000
Naviance Advertisement	\$80,000
Digital Advertising	TBD
UMassD Website	NA
College Fairs – Non-High School (NACAC, etc.)	\$16,900
College Fairs – High School Based	\$42,000
FAFSA Filers non-admissions apply	NA
RaiseMe	\$20,000

High School Sophomores and Juniors

Sources	Cost
PSAT Name buys	\$30,000
High School Visits	NA
Naviance Advertisement	NA
Digital Advertising	TBD
UMassD Website	NA
College Fairs – Non-High School (NACAC, etc.)	NA
College Fairs – High School Based	NA
RaiseMe	NA

Parents of High School Sophomores and Juniors

Sources	Cost
PSAT Name buys	NA
Naviance Advertisement	NA
Digital Advertising	TBD
UMassD Website	NA
College Fairs – Non-High School (NACAC, etc.)	NA
College Fairs – High School Based	NA

High School Counselors, Guidance Staff, & Teachers

Sources	Cost
UMassD Website	NA
High School Visits	NA
Purchased counselor list	NA
UMassD owned data mined list	NA

High School Athletic Coaches, Special Major Advisors (Arts)

Sources	Cost
UMassD Website	NA
High School Visits	TBD
UMassD owned data mined list	NA

First-Time Transfer Students

Transfer Students Enrolled in Community Colleges

Sources	Cost
Community College Visits	\$20,000
Digital Advertising	TBD
UMassD Website	NA
College Transfer Fairs	\$7,500
College Academic Advisors	NA
PTK Name Buys	TBD

Transfer Students Enrolled in other 4-Year Institutions

Sources	Cost
3-year Prior Admit Pool	NA
5-year Prior Inquiry/Prospect Pool	NA
UMassD Website	NA
College Transfer Fairs	NA
Digital Advertising	TBD

Special Target Audiences

Each year, special target audiences are identified as specific segments of the prospective student pool that will receive supplemental targeting advertising. These audiences may represent subsets of other targeted audiences.

Sources	Cost
Honors College	\$15,000
Merit Scholarship Eligible	NA

Connectors

Connectors represent friends and supporters of the University that may be in the position to refer students to apply and encourage enrollment.

Sources	Cost
Alumni	NA