

Unmasking the Enrollment Manager Behind Every Financial Aid Professional

Joretta Nelson
Vice President for
Enrollment Management
Brevard College

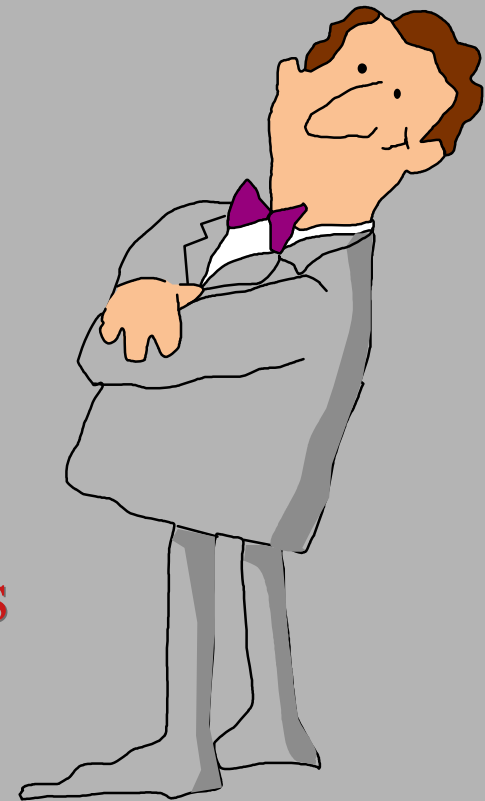


Tony Carter
Director of Financial Aid
University of North
Carolina-Charlotte

John W. Dysart
President
The Dysart Group, Inc.

The Financial Aid Advantage

- Particulars of Craft
- Understanding of Revenue
- Detail Orientation
- Data-Driven Approach
- Knowledge in the Trenches
- Retention



Particulars of Craft

- Distinct Learning Curve
- Broad Internal and External Constituencies
- Generally Lengthy Experience
- Supervision Benefits

Understanding of Revenue

- Financial Aid Director vs. VP for Finance
- Financial Aid Award Policies
- Impact of Pricing
- Accountability to Bottom Line



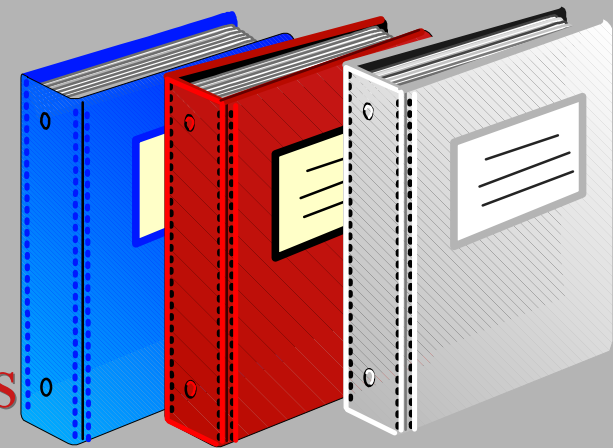
Detail Orientation

- Analytical Skills
- Federal and State Reports
- Document Accountability
- Folder Complexity
- Audit Experience
- Federal and State Regulations



Data-Driven Approach

- Modeling Experience
- Conversion Rates
- History
- Reporting Mechanisms
- Expenditure Tracking



Knowledge in the Trenches

- Student Counseling
- Parent Counseling
- Constituency Control
- Appeals



Retention

- Financial Implications
- Matters Influencing Attrition
- Currently Enrolled Students

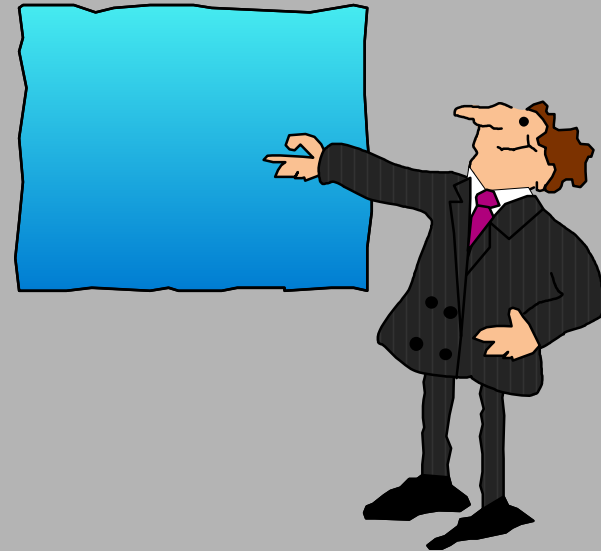


Good Enrollment Management Qualifications:

- Skills
- Understanding of Revenue
- Attention to Detail
- Data Analysis
- Constituency Relations
- Retention

Skills

- Financial Aid Learning Curve
- Broad Constituencies
- Experience is Critical
- Supervision Expertise



Understand Revenue

- Responsible for Net Tuition
- Policies Must Support Retention and Recruitment
- Participate in Pricing Strategies
- Accountability for Headcount, Recruitment, Retention, Academic Quality and Revenue

Attention to Detail

- Data-Driven Numbers Game
- Reports-Strategic Plans
- Integrate Information from Various Offices
- Plans are Open to Criticism and Review by Other Groups

Data Analysis

- Modeling / Projections
- Conversion Rates
- History
- Summary Reports
- Tracking Mechanisms



Constituency Relations

- President
- Finance Vice President
- Admissions
- Registrar
- Financial Aid
- Faculty
- Board of Trustees
- Alumni
- Peers



Why FA Professionals are Underrepresented in EM Positions?

- History
- Not Taken Seriously
- Lack of Promotion by FA Professionals
- Confidence
- Professional Satisfaction

Why YOU Should Apply for Enrollment Management Leadership Positions

- Uniquely Qualified
- Improve Service to Students and Parents
- Support Institutional Goals and Health
- Set An Example
- Compensation
- Power to Change
- Moral Obligation

How to Attain Leadership Positions

- Market Yourself
- Attend Meetings
- Professional Development
- Demonstrate the Role of Financial Aid
- List Serves
- Apply