KENNEDY & COMPANY

Chabot-Las Positas Community College District,

Equity-Driven Enrollment Assessment

September 2022

CONTENTS

- Kennedy & Company Team

- Overview of project plan

- Project timeline

- Progress update

- Next steps

Kennedy & Company Team

Project Team Introductions

Mickey Baines (Partner) has over 20 years of experience as a consultant and administrator in higher education. Mickey focuses on helping enrollment teams deepen their knowledge of their prospective student pool, making more informed decisions through the use of CRM and other technologies to better engage prospective students. He has led implementations using multiple CRM platforms including Slate, Salesforce and Microsoft Dynamics. His focus is on maximizing the use of the CRM through a blend of product customization, business process modification, and user training and adoption.

Amy Maltagliati (Technical Manager) is a higher education strategist with over a decade of experience in admissions, advising, and enrollment management roles. She is 4x Salesforce certified, holds a Lean Black Belt, and is also a Certified-Agile Scrum Master. She values continuous, innovative thinking while fostering the ability to strategically meet and exceed goals at colleges and universities. With a strong emphasis on collaboration and teamwork, her project management and leadership styles focus on utilizing CRM platforms for data-driven decision-making and creating proactive changes to achieve successful outcomes. Amy has worked at both inner-city and rural community colleges, online and non-traditional colleges, as well as large R-1 institutions, having gained experience at both the undergraduate and graduate levels.

PROJECT TEAM INTRODUCTIONS

Kendra Grinnage (Senior Manager) works with education institutions on various strategic initiatives including the development of online education strategy initiatives, academic portfolio management, and diversity, equity, and inclusion strategic planning. Additionally, she has significant experience in college counseling, K-12 admissions, student financial aid counseling and residential student life programming. Kendra holds a B.A. in history and African American Studies from the University of Virginia and a MSEd. in Higher Education from the University of Pennsylvania where her work predominantly focused on increasing equity and access for underrepresented students. She serves on the board of New Futures DC, a scholarship organization focused on connecting low income and under-represented young people with associate's degrees and short-term credentials.

Julia Brickfield (Analyst) conducts qualitative and quantitative analyses of the enrollment practices, tuition pricing strategies, and academic portfolio offerings at institutions of higher education. Julia recently graduated from the University of Pennsylvania with a B.A. in political science. During her time as an undergraduate, Julia was a research assistant at the University of Pennsylvania's Graduate School of Education where she assisted on projects relating to college promise programs, state funding formulas, college ranking systems, and the use of technology in higher education. She also has experience working at a state higher education agency and in federal education policy consulting.

Project Approach

PROJECT CONTEXT & GOALS

Kennedy & Company will assess the operations of Chabot's and Las Positas' enrollment and business processes, as well as a CRM Audit to evaluate how the institutions are leveraging their CRM to optimize the enrollment process. All steps throughout this process will focus on identifying equitable practices for students and staff.

PROJECT GOALS

Through this initiative, K&Co will complete the following:

- Formulate an understanding of the current state of recruitment, enrollment, and conversion practices, including points of departure from the process.

- Assess the current strengths of Chabot-Las Positas CRM as well as opportunities for leveraging the CRM in the enrollment process.

- Recommend practices to optimize the work of marketing and recruiting teams to help the District recover its enrollments to historic levels and ensure that recruitment and enrollment is equitable for all students.

Utilizing the methodology and approach outlined on the following slides, Kennedy & Company will synthesize our findings into recommendations that the District could pursue to recover its enrollments and generate an equitable recruiting model.

Our work involves three phases, with the data collected in each phase informing and supporting future phases. This work began with a current state assessment and is followed by a CRM audit. Findings from both phases will be synthesized into a Strategic & Operational Enrollment Plan.

PROJECT PHASES

1. Current Enrollment Strategy & Operations Assessment → Interviews, Focus Groups, Survey of Students, Competitor Analysis, & Enrollment Projections → Identify gaps in current enrollment & conversion activities, market analysis

2. CRM Audit → In-System Audit, Interviews, Strategy Analysis, & Future State Roadmap → Understand how well current technologies are supporting enrollment strategies and tactics

3. Strategic & Operational Enrollment Plan → Recommendations for future-state action plan

**Recommendations would fall into several areas:**

- Recruiting and Conversation Strategy & Tactics
- Equity-Driven Models of Recruitment & Enrollment
- Potential CRM Enhancements
- Key Data to Track & Analyze Enrollment Strategies

Throughout the course of this work, there will be various ways that the staff at Chabot and Las Positas Colleges will be engaged. Our goal is to gather a broad set of perspectives from across the various teams and levels within the District.

ENGAGEMENT PLAN, BY PHASE

1.
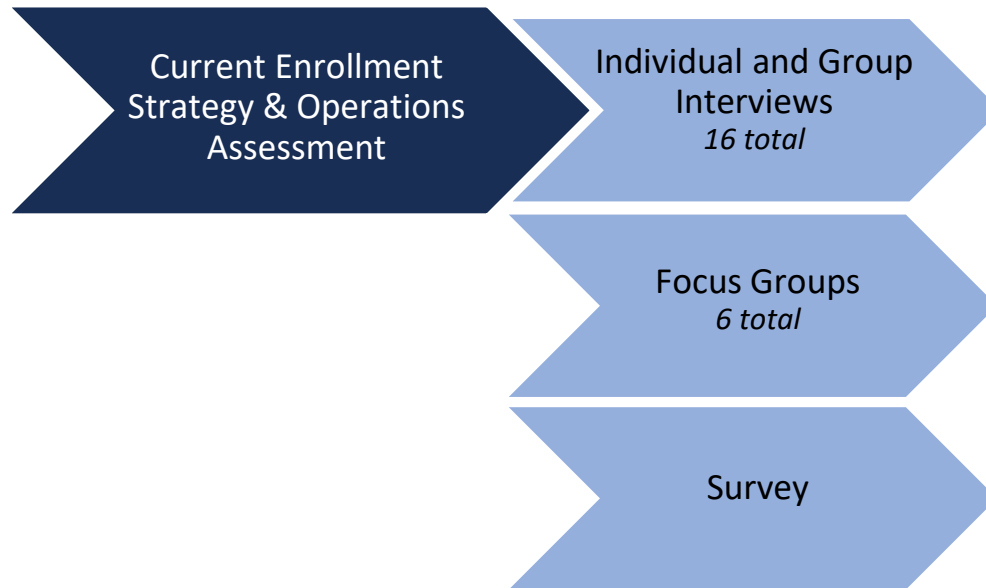
| Current Enrollment Strategy & Operations Assessment | Individual and Group Interviews *16 total* | - *Admissions and Records*
- *Financial Aid*
- *Counseling*
- *Enrollment Services*
- *Student Services* |

| Focus Groups *6 total* | - *First-time*
- *Returning and transfer*
- *California Promise/low-income* |

| Survey | - *Currently and formerly enrolled students in the Chabot-Las Positas Community College District* |

2.
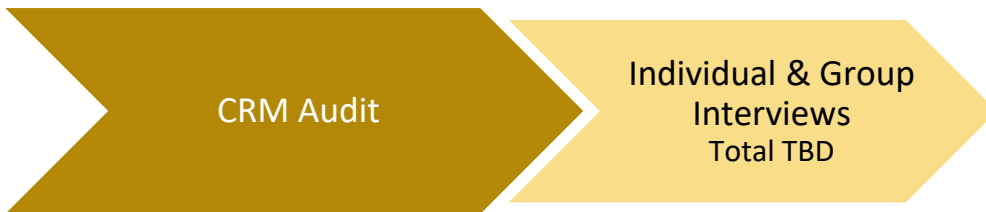
| CRM Audit | Individual & Group Interviews Total TBD | - *SIS and CRM Support Staff*
- *Admin Systems Analysis & Functional Support*
- *College Technology Services* |

PROJECT ENGAGEMENT OPPORTUNITIES

In addition to being part of any interviews or focus group, there are additional opportunities to be engaged with this project.

- A website will be published next week to encourage communication and feedback about the equity-driven enrollment assessment
  - Community members can stay up to date with monthly updates and view presentation materials
  - A form will be available to submit feedback
- The Chancellor's Council will serve as the advisory body and individuals can connect directly with their representative or attend the monthly meetings
- Connect directly with Project Co-Leads:
  - Theresa Fleischer Rowland Ed.D. - Vice Chancellor, Educational Services & Student Success

    Email: trowland@clpccd.org
  - Dionicia Ramos - Director, Public Relations, Marketing & Government Relations

    Email: dramos@clpccd.org

Kennedy & Company is committed to using a comprehensive approach to ensure that student, staff, and faculty perspectives are included in our review and future state recommendations.

Anticipated Project Timeline

Work on this project began in August 2022 with the aim of completing our work in 5 months. Monthly updates on progress will be provided to the Chancellor's Council.

PROJECT TIMELINE

⭐ Project Deliverable

Project Component	Month 1	Month 2	Month 3	Month 4	Month 5
Project Set-Up	■				
Interviews and Data Collection	■	■	■		
Current Enrollment Strategy & Operations Assessment		■	■	■	
Enrollment Organization & Operations		■	■	■	
Market & Competitor Review			■	■	
Enrollment Projections Modeling			■	■	
CRM Audit			■	⭐	
Development of Strategic & Operational Enrollment Plan				■	⭐

K&Co

Updates and Next Steps

PROGRESS UPDATE

We are almost done completing interviews with key team members at Chabot and Las Positas in enrollment services, financial aid, counseling, and student services. Additionally, we have begun analysis of institutional data on the enrollment funnel.

- 13 interviews with VPs, Dean/Directors, and classified-level members of enrollment services, financial aid, counseling, and student services have been concluded. There are 3 remaining.

- ITS provided Kennedy & Company with historical data (prior to and in the years following the pandemic) on the application and enrollment funnel at Chabot and Las Positas

- Secret shopper analyses are underway at Chabot and Las Positas, as well as two competitor institutions

Administration, staff, and student experiences will be crucial to informing Kennedy & Company's final recommendations.

Next Steps

Competitive analysis and market research will happen in conjunction with the beginning of the CRM audit process. Kennedy & Company will be connecting with members of ITS to better understand how enrollment-focused technology is used at Chabot and Las Positas.

- Focus Groups and Data Collection

  - 6 focus groups will be conducted in the coming weeks to better understand the student perspective on the enrollment process at Chabot and Las Positas

  - We will analyze historical enrollment trends using institutional data, including the sequencing of steps in the enrollment process and when students complete them

- Competitor Analysis and Market Research

  - Secret shopper analysis at Chabot and Las Positas, as well as two competitor institutions, using 3 distinct prospective student profiles

  - Advanced demographic analysis of the district's market for prospective students and transfers

  - Research into nationwide and local trends regarding pedagogical pathways that students prefer

- CRM Audit

  - Conduct a full in-system audit to understand the current state of the CRM and third-party products integrated into the system

  - Conduct CRM Interviews to understand current operations, orgs, processes, and policies while identifying current and future priorities and goals

K&CO