

Snow College Environmental Scan

Spring 2018



**SNOW
COLLEGE**

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Letter from the President

Dear Faculty and Staff:

As a two-year state college located in central Utah, Snow College offers a superior education experience at the certificate, associate, and specialized bachelor degree level (in commercial music and software engineering). The opportunity to provide an excellent educational experience combined with for innovative teaching and learning initiatives and collaborative and community-aware activities is central to our mission.

As an open-enrollment institution, Snow College is committed to helping students from all backgrounds realize the importance of higher education, achieve their intended matriculation goals, and find satisfaction in their student experience. This is supported by a pervasive philosophy of individualized attention and genuine care, known as the “Spirit of Snow.” The personalized student experience is at the heart of our history and is embedded in our plan, operations, and daily practices. Our class sizes are small, our residential campuses are engaging, and our cost is affordable. Most importantly, our employees are exceptional, and our students are superb.

As an institution of higher learning, we have high expectations for our students and ourselves. Our success is measured by our strategic vision and supported actionable goals. In support of our success and to answer on-going questions of effectiveness, the College has invested time and resources to develop a strategic enrollment plan. This plan intends to use extensive data analysis to formulate distinct recruitment and retention priorities that will certify the College’s place in the Utah System of Higher Education and sustain our role as the “crown jewel” among all the state’s institutions.

Thank you to those who have invested their time and talents to this planning process. I look forward to working with each of you on our Richfield and Ephraim campuses as we continue to build upon our excellence and plan for future with clarity and direction.

Gary L. Carlston, PhD
President

Letter from SEM Steering Committee Leadership

Snow College commenced a strategic enrollment management process (SEM) in fall 2017 under the leadership of Vice President Steve Hood (Academic Affairs) and Vice President Craig Mathie (Student Success). SEM aligns with the institution’s strategic plan to provide a collective mentality focused on the external environment and individualized student success in order to increase enrollment, retention, graduation and transfer rates as well as build programs and enhance the quality of our services. Faculty and staff from Academic Affairs, Business & Finance, and Student Success have provided dedicated participation to the development of this plan.

Snow College accepts the challenges that face higher education nationally and in the state of Utah. The Strategic Enrollment Management plan intends to address these challenges in order to sustain the vitality of the institution and its critical role in Utah’s higher education landscape. The Strategic Enrollment Management plan provides a “roadmap” for meeting enrollment objectives, enhanced student success outcomes, and fiscally sound practices in order to have future students with the same spirit and dedication that has defined our history.

Steve Hood
Vice President of Academic Affairs

Craig Mathie
Vice President of Student Success

Executive Summary/Introduction

Snow College's strategic enrollment management plan achieves a number of critical functions in order to help the college move forward with its commitment to student success via curricular and co-curricular excellence, high-impact and innovative teaching practices, and engaged citizenship and community opportunities. Additionally, the strategic enrollment management plan assists the college in coordinating across-the-board policy and practice toward the achievement of student-centered matriculation goals and student satisfaction with the undergraduate experience.

All higher education institutions operate in environments that have a variety of external factors that influence campus goals and services. Effective enrollment planning addresses the external factors that exist today and incorporates (to the extent possible) future trends. An Environmental Scan brings all that information together in a comprehensive data package to be used to support focused recruitment and retention discussions for more effective decision-making.

An Environmental Scan is the first step in the development of a strategic enrollment management plan. The Environmental Scan provides the college with a solid empirical foundation upon which the SEM plan's goals and tactics are grounded. Snow College faces steady budget pressure and increasing competition for students many of whom are underprepared for college in the areas of academics, finances, and mental health. The Environmental Scan underscores these issues so that the college can define and expand its recruitment footprint, leverage additional financial aid opportunities, and provide the personal support to help students succeed. Despite being higher than current national averages, our first-time freshmen persistence and retention rates have declined—30% of new freshmen leave the institution after the first semester and approximately half are gone by the next fall semester. All this information helps the strategic enrollment plan frame objectives, goals and tactics within the two themes of recruitment and retention.

Snow College's Environmental Scan represents data in the main areas of

- **The Potential College Population:** Demographic data on the high school population at state, regional, and national levels.
- **The Cost and Affordability of College:** National and state data on higher education appropriations, student financial aid, and tuition comparisons.
- **The College Recruiting Environment:** Information on how students seek and select college including the role of technology in communicating with students and parents.
- **Other Factors Affecting Student Recruitment and Retention:** Data on college student food insecurity and mental health.

ENVIRONMENTAL SCAN

Institutional Overview

Snow College is one of eight public colleges and universities in the Utah System of Higher Education (USHE) governed by a nineteen-member Utah State Board of Regents appointed by the Governor. Snow College also has a ten-member board of trustees, who are appointed by the Governor.

Founded in 1888, Snow College is one of the oldest two-year state colleges in the western United States. Originally established as a residential academy, the institution provided teaching and learning opportunities tailored to the formative years of early adult and adult learning. Today, Snow College is a comprehensive two-year community college with campuses in Ephraim and Richfield. Its purpose is to transmit knowledge and skills through transfer education, a bachelor of commercial arts (in music) degree, a bachelor's degree in software engineering, associate of arts and associate of science degrees along with offering associate of applied science degrees, career and technical education, customized training for employers, developmental education, and strong student services to support these functions. Emphasis is placed on teaching, training, scholarly, professional, and creative achievement, and community service (taken from the 2017-2018 Snow College Catalog).

Most course offerings are delivered live in a face-to-face format, frequently with technology enhancement, with some courses broadcast from one campus to another. Some limited Snow College courses are offered at the Central Utah Correctional Facility in Gunnison and in area high schools. Students also have access to Snow College programs through online distance education offerings. Snow College is a teaching institution which means the majority of faculty (66%) devote their full attention to instructing students.

The composition of the student body is approximately 39 percent from the local six-county area, another 50 percent from elsewhere in Utah, and 11 percent from other states and international locations. Since 2008, Snow College has been the clear leader in enrollment growth among all state higher education institutions with 45% headcount and 26% FTE growth, respectively.

Snow's rural location is a wonderful setting for a college. Students and their parents like the fact that Snow is a safe, comfortable environment. There is a real feeling of 'family' at Snow with many students representing the third or fourth generation of their family at the college.

The College also serves as the intellectual, artistic, musical, educational, and sports center of central Utah. The institution is accredited by the Northwest Commission for Colleges and Universities and holds specialized program accreditation by the National Association for Schools of Music, the National Association for Schools of Theatre, the Association of Collegiate Business Schools and Programs, and Accreditation for Education in Nursing.

In recognition of the quality of Snow College, the Aspen Institute, headquartered in Washington, D.C., recently announced that Snow College was included in their list of "120 Top U.S. Community Colleges" for the fifth year in a row (<http://www.aspeninstitute.org/policy-work/college-excellence/overview>). Additionally, our collegiate performance groups have been honored across the intermountain west and the athletic programs are consistently ranked among the best in the country.

Mission Statement

Snow College continues a tradition of excellence, encourages a culture of innovation, and cultivates an atmosphere of engagement to advance students in the achievement of their educational goals.

Snow College strives to fulfill its mission by honoring its history and advancing its rich tradition of learning by providing a vibrant learning environment that empowers students to achieve their educational goals, encouraging and supporting innovative initiatives that create dynamic learning experiences for the college community, and creating learning and service opportunities, locally and globally, to engage students, faculty, staff, and surrounding communities (approved by the Snow College Board of Trustees, February 16, 2011 and the Utah State Board of Regents, July 15, 2011).

The mission of Snow College is governed by the core themes of:

1. Tradition of Excellence: Snow College honors its history and advances its rich tradition of learning by providing a vibrant learning environment that empowers all students to achieve their educational goals.
2. Culture of Innovation: Snow College encourages and supports innovative initiatives among students, faculty and staff that create dynamic learning experiences for the entire college community.
3. Atmosphere of Engagement: Snow College fosters many opportunities that engage the College and surrounding communities in local and global learning and service opportunities.

Snow College has identified objectives which “define” respective core themes. Each objective has one to four key performance indicators (KPIs) which “define” the objective. Data is collected for each KPI throughout the year and is reviewed by institutional personnel to evaluate the extent to which each core theme objective is being achieved. By judging the level of achievement of each core theme objective, and then the core theme itself, a comprehensive picture of institutional achievement emerges and is used in assessing mission fulfillment.

Strategic Goals

Snow College’s 18-month strategic planning process (March 2013 to September 2014) provided for a comprehensive review of core theme performance indicators. As a result, additional strategic goals were identified under each core theme with new performance indicators. Further, recommendations were made to current performance indicators to provide more reliable assessment measures. These changes were vetted by mission fulfillment committee members (spring semester 2015 and 2017) with implementation (including established data collection measures, targets and thresholds) completed by December 2015 and January 2018.

The following strategic goals were developed to address budget and resource allocation given the tactical direction of the College for the next five to ten years. These goals are listed along with the guiding core themes in parenthesis (<https://www.snow.edu/academics/office/>).

- Quality Instruction and Student Services (Core Theme 1): Snow College seeks to identify and employ high impact pedagogy and teaching practices across a variety of educational venues, including distance education via technology to high school students pursuant to legislative mandates (Senate Bill 38). In addition, Snow College will develop a more robust faculty and staff development program to provide consistency and rigor and improve communication and collaborative efforts across all disciplines and co-curricular activities.
- General Education (Core Themes 1, 2, and 3): Snow College accepts the challenge to design and implement a new, integrative general education model. This includes the hiring of a full-time General

Education Director, who will coordinate the development of a new model and assessment plan, generate faculty participation through training and mentoring programs, and create a culture of excitement among students to become lifelong learners.

- 2-Year/4-Year Program Development (Core Themes 1, 2, and 3): With the implementation of the Bachelor's Degree in Commercial Music and given current and predicted influences/demands for four-year degrees, Snow College will develop a rubric by which four-year program proposals can be developed, approved, and implemented. In addition, the College will continue to pursue program-specific articulation agreements with in-state and out-of-state schools. Top areas of study (i.e., majors) will be identified and curriculum guides will include pathways to career placement and/or degree attainment.
- Economic Development and Workforce Preparation (Core Themes 1 and 3): Snow College will increase the standard of living in its six-county service region by enriching current career and technical programs with applicable general education knowledge and entrepreneurial skills; structuring current programs into logical pathways that prepare students for various placement in industry; providing new programs and integrated internship opportunities tailored to economic needs; and create educational activities that are amenable to today's working adult.
- Cost and Affordability (Core Theme 1): Recognizing that much of Snow College's excellence rests in the quality of its faculty and staff, the institution will develop a long-term strategy to raise median salaries in order to attract and retain high-quality faculty. In addition, the College will work hard to maintain affordable tuition and housing rates while developing campaigns to provide more scholarship dollars to new and continuing students as well as improve student employment opportunities on both campuses.

Strategic Goals Indicators. As a result of a comprehensive strategic planning process, 11 indicators were developed representing the five main strategic planning goals.

- Oversee and manage quality in all teaching venues (Quality Instruction and Student Services).
- Identify and implement the use of more high impact practices such as learning communities, service learning, experiential learning, and course pairings (Quality Instruction and Student Services).
- Design and implement a new, integrative model for general education (General Education Development).
- Hire a director for general education who will lead the GE Committee, manage GE assessment, create standards and rubrics for integrative courses, provide faculty mentoring and training, and instigate professional development opportunities for engaged faculty (General Education Development).
- Develop a process and rubric by which new four-year degree programs can be successfully developed, approved, and implemented (2-Year/4-Year Program Development).
- Establish articulated transfer agreements with in-state four-year programs as well as some out-of-state schools (2-Year/4-Year Program Development).
- Enrich workforce preparation programs requirements with GE courses that provide interdisciplinary and entrepreneurial skills (Economic Development and Workforce Preparation)

- Structure programming in order to maximize opportunities for students, create logical pathways, and provide the greatest preparation for students transferring to industry (Economic Development and Workforce Preparation).
- Increase the standard of living in the six-county region by providing career opportunities for graduates of Snow College through economic development partnerships (Economic Development and Workforce Preparation).
- Develop a long-term strategy to increase salaries to their median market range in order to attract and retain high quality faculty and staff (Cost and Affordability).
- Improve student employment opportunities and communication about such on both campuses (Cost and Affordability).

Initial Strategic Enrollment Findings:

In October 2017, Snow College conducted a brief survey among full-time faculty and staff regarding the institutions recruitment and retention practices. The survey asked questions on the mission, goals, resources, and processes associated with Snow College's recruitment and retention activities. Aggregated averages used a 5-point grading scale (A to F) to assign a grade to each specific content areas and report an overall enrollment management grade (see Appendix A). Not a single element of the survey received a grade higher than C, indicating that the college's recruiting and retention efforts are adequate but in need of significant improvement. The results support a need for an institutional strategic enrollment plan. The Strategic Enrollment Management committee intends to use this information to frame enrollment management goals and tactics and re-administer this survey after the implementation of a SEM plan in order to determine progress.

Institutional Strengths

Following the administration of the strategic enrollment survey (October 2017), various full-time faculty and staff participated in an enrollment management SWOT analysis. The following top-ten strengths were identified as existing factors in support of Snow's strategic enrollment planning process:

- Affordability
- Great student-to-faculty ratio (20:1)
- Great academic product
- 2-campus model with strong career and technical education preparation, academic transfer offerings, and distinct four-year degree options
- K-16 Alliance
- Student-centered faculty and staff community
- Willing to learn and improve faculty and staff community
- A two-year community college with a residential life component
- Global engagement opportunities
- Prospective student on-campus recruitment activities--SnowBlasts

Institutional Improvements/Goals

Following the administration of the strategic enrollment survey (October 2017), various full-time faculty and staff participated in an enrollment management SWOT analysis. The following top-ten weaknesses were identified as existing factors impeding the development of Snow's strategic enrollment planning process:

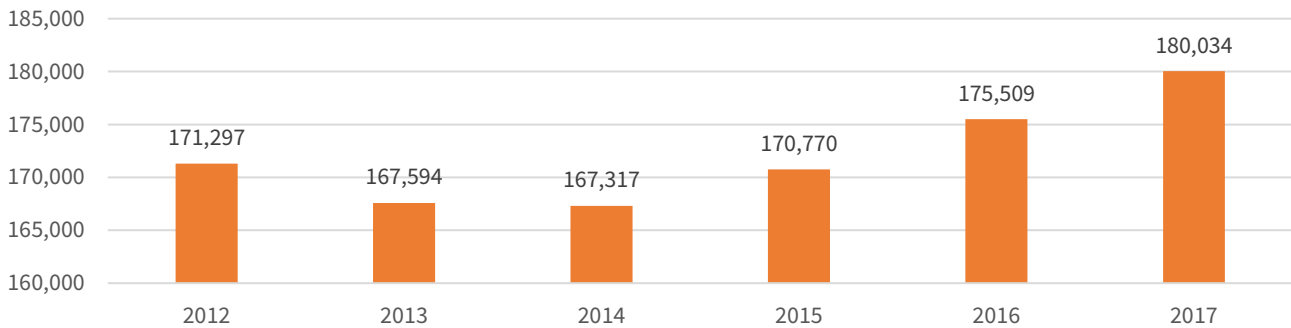
- Lack of accountability
- A faculty v. staff divide
- The lack of an enrollment management plan
- Current course scheduling practices
- Silo-type institutional operations
- The lack of a student portal
- The lack of internal communication and self-advertising of existing and improved services
- The lack of mandatory advising for new and/or underprepared students
- The lack of student jobs both on-campus and off-campus
- Confused students—information about recruitment, admissions, scholarships, and course registration not delivered using the appropriate media channel or in a timely manner
- Low yields from application to enrollment
- Budget issues

STATE, NATIONAL and INTERNATIONAL PROFILE

Enrollment in Utah’s Public Colleges and Universities

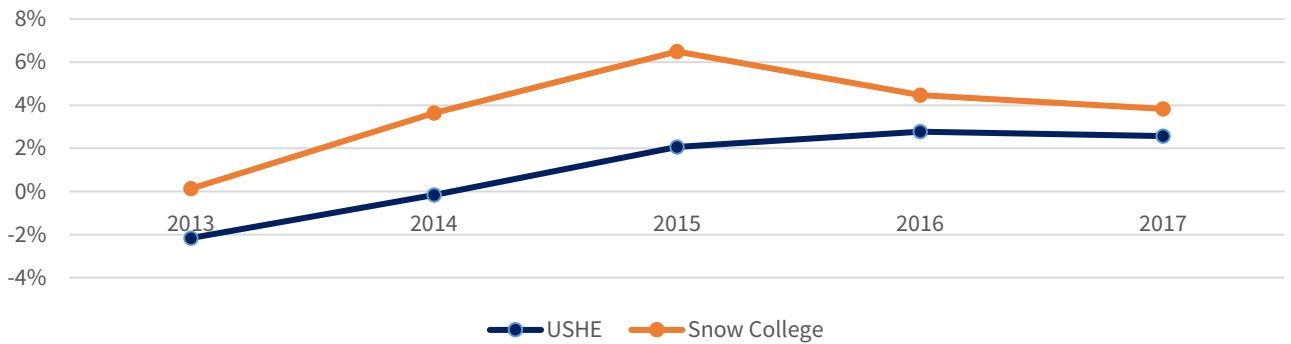
Utah’s public colleges and universities saw another consecutive year of growth, up 2.78% from 2016. Prior to these increases, the state experienced two years of flat enrollments. Both the flat enrollments and the recent growth is attributed to the missionary age change by the Church of Jesus Christ of Latter-day Saints—missionaries that left the system (2013-2015) have returned (2016-2017) to matriculate in college programs across the state. Additionally, the full-time equivalent (FTE) of students was larger, at 2.79% (2016) which means students are taking heavier course loads¹.

USHE Headcount Enrollments



Snow College is among the fastest growing USHE institutions with growth rates at least 2% to 3% higher than system rates.

USHE Fall Enrollment Percent Change



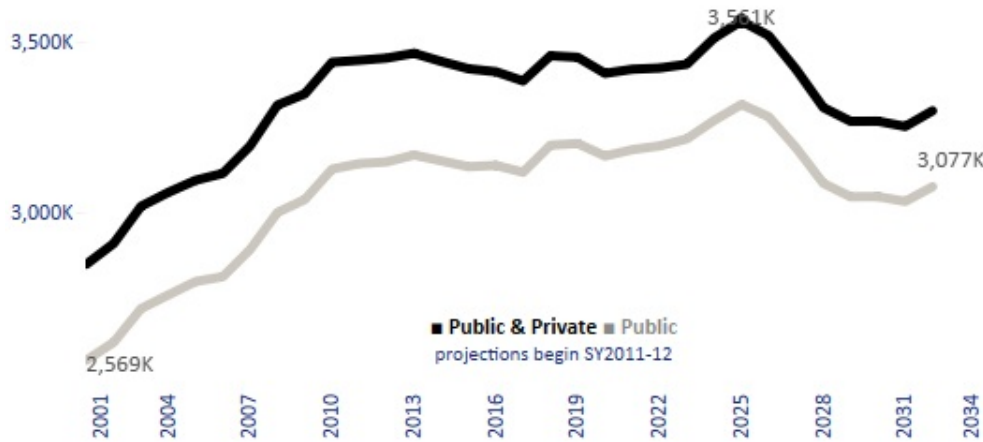
	Fall 2013	Fall 2014	Fall 2015	Fall 2016	Fall 2017
% USHE Enrollment Change	-2%	0%	2%	3%	3%
% Snow College Enrollment Change	0%	4%	6%	4%	4%
Total USHE Enrollment	167,594	167,317	170,770	175,509	180,034
Total Snow College Enrollment ²	4,605	4,779	5,111	5,350	5,563

¹ USHE 3rd Week reports. <https://higheredutah.org/data/enrollments/>

² Snow College 3rd Week Reports, Tables 2A for respective fall semesters.

High School Graduates: United States and Utah

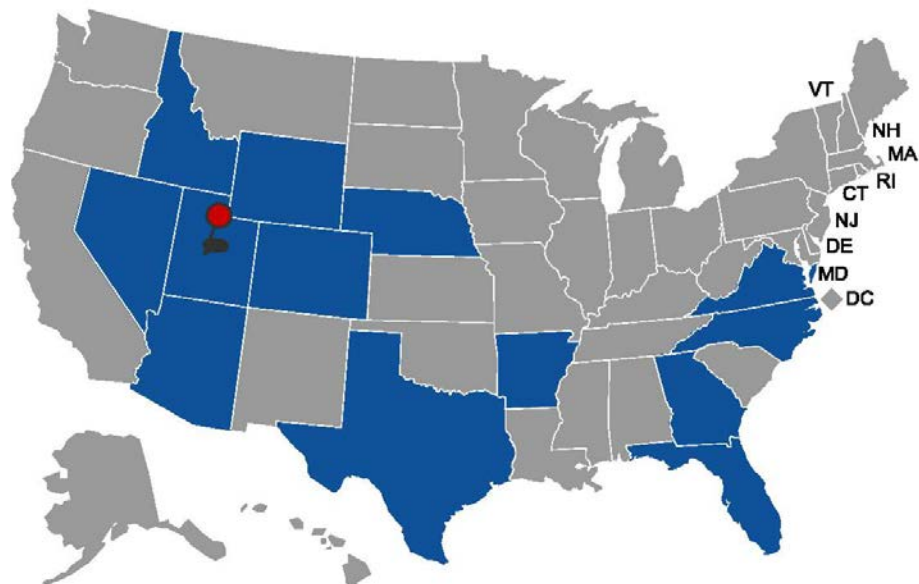
The Western Interstate Commission for Higher Education (WICHE)'s, *Knocking on the College Door* 2016 report notes a significant national decline in the number of high school graduates that started 2010/11 and will continue for several years, even decades. This is in sharp contrast to sustained growth experienced from 1990-2010 when colleges and universities were assured an ever-increasing supply of potential students³.



- 3,409,100 high school graduates (on average) projected per year between 2011-12 and 2031-21
- The total number of graduates is projected to increase by 3.1% between 2011-12 and 2024-25, the next highest year for the United States.

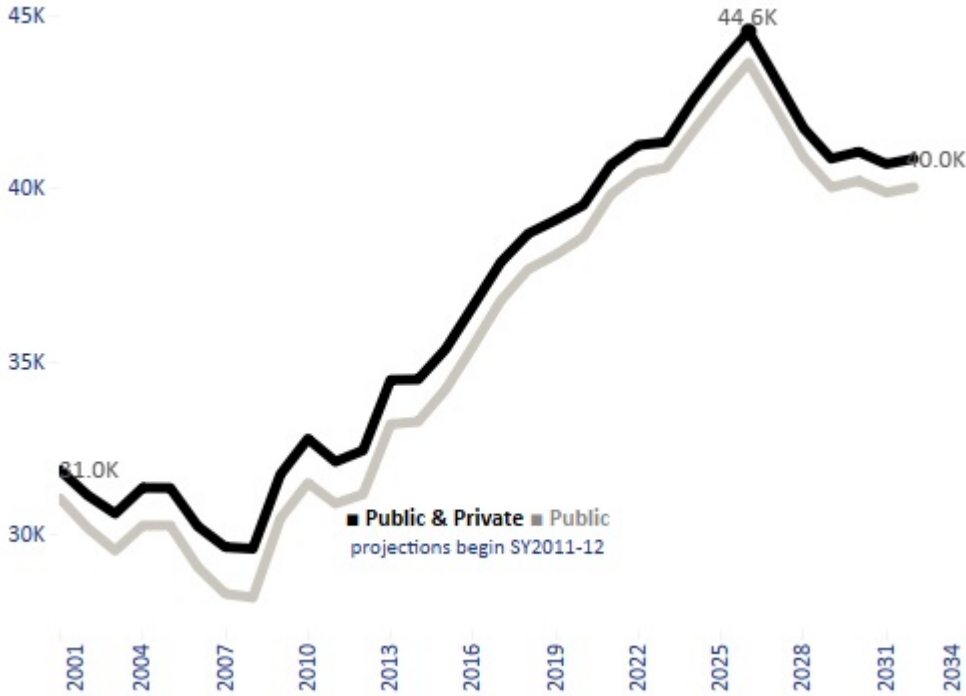
States that will experience declines in high school graduates include Alaska, California, North Dakota, Michigan, Wisconsin, Illinois, Louisiana, Mississippi, Alabama, Ohio, West Virginia, Pennsylvania, Maryland, Delaware, New York, Connecticut, Rhode Island, Massachusetts, Vermont, New Hampshire, and Maine. All other states colored gray will not see any increase in graduates (they remain flat).

Utah is projected to experience 37.4% or higher growth in high school graduates while the nation experiences only 10% growth (projections from 2011-12 to 2025-26).



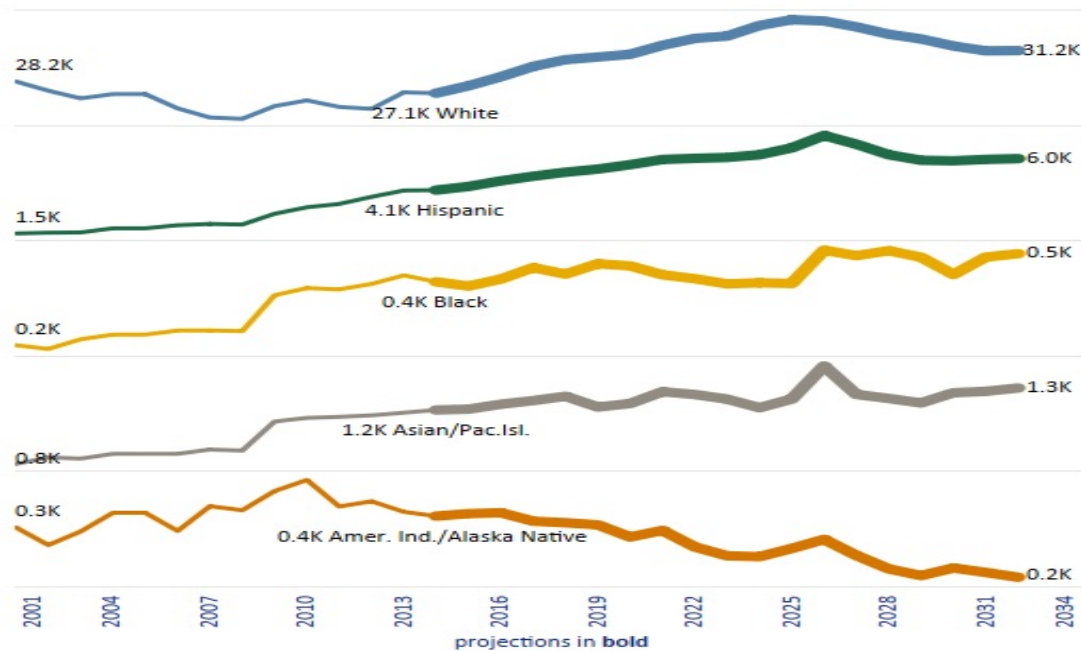
SOURCE: Western Interstate Commission for Higher Education

³ Bransberger, Peace., Michelau, Demaree, K. (2016). *Knocking on the College Door* (9th eds). <https://knocking.wiche.edu/>



Utah's high school graduation rate from public and private schools is projected to significantly increase over the next fifteen years. This represents approximately 39,600 high school graduates (on average) and contributes to 4.5% of the West's total number of graduates.⁴

The racial/ethnic mix of high school graduates in Utah will experience a slight shift to include more Hispanic students. White graduates will change from 82% to 79% (around 4,100 more 2031-32 than 2012-13). Non-white graduates will increase by 2,000 by 2031-32 (a change from 18% to 21% of high school graduates). Compared to the western United States, Utah will continue to exhibit less student diversity.



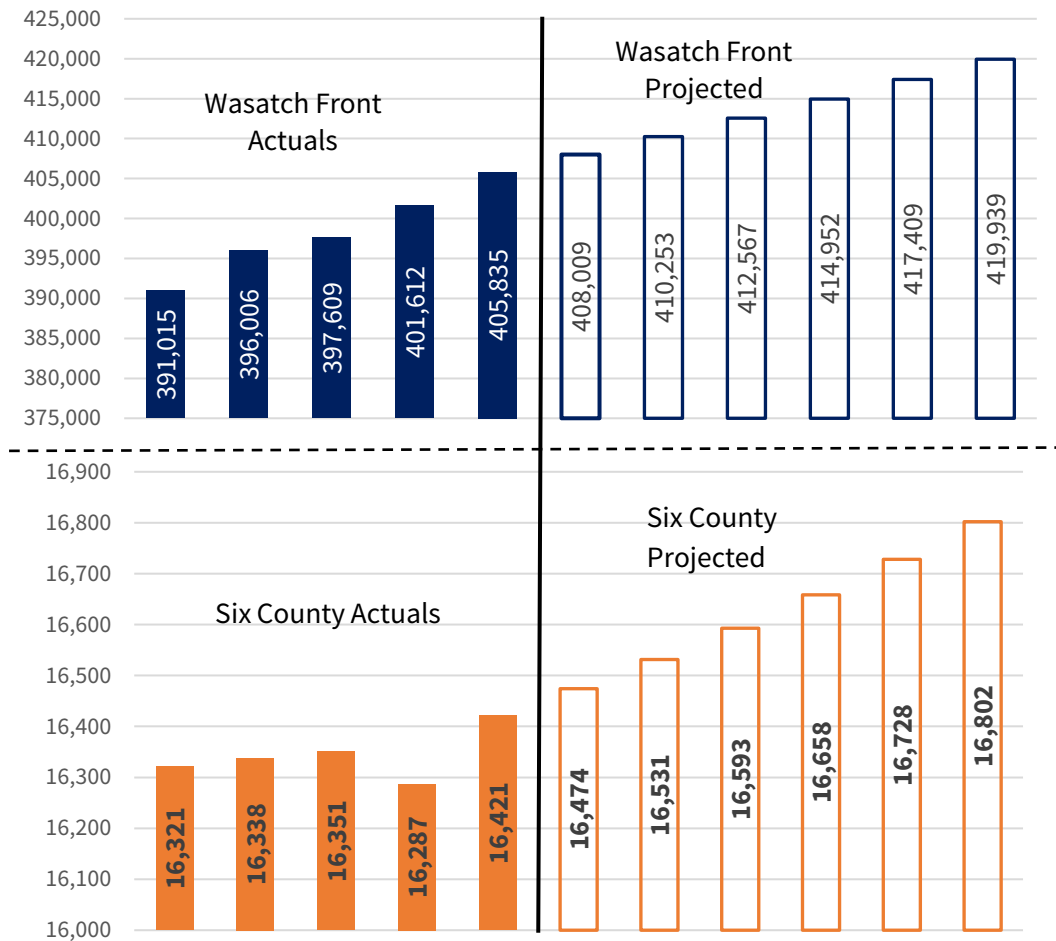
Source: WICHE, *Knocking on the College Door* (9th eds.). <https://knocking.wiche.edu/state-profiles/>

⁴ Bransberger, Peace., Michelau, Demaree, K. (2016). *Knocking on the College Door* (9th eds.). <https://knocking.wiche.edu/>

High School Graduates by Main Service Areas

High school student enrollment and graduation is expected to increase in Snow College’s main (Six-County) service area. Class sizes are expected to increase by .3% annually, which is slightly lower than growth rates for the Wasatch Front (.5%) and other areas of Utah (.7%).

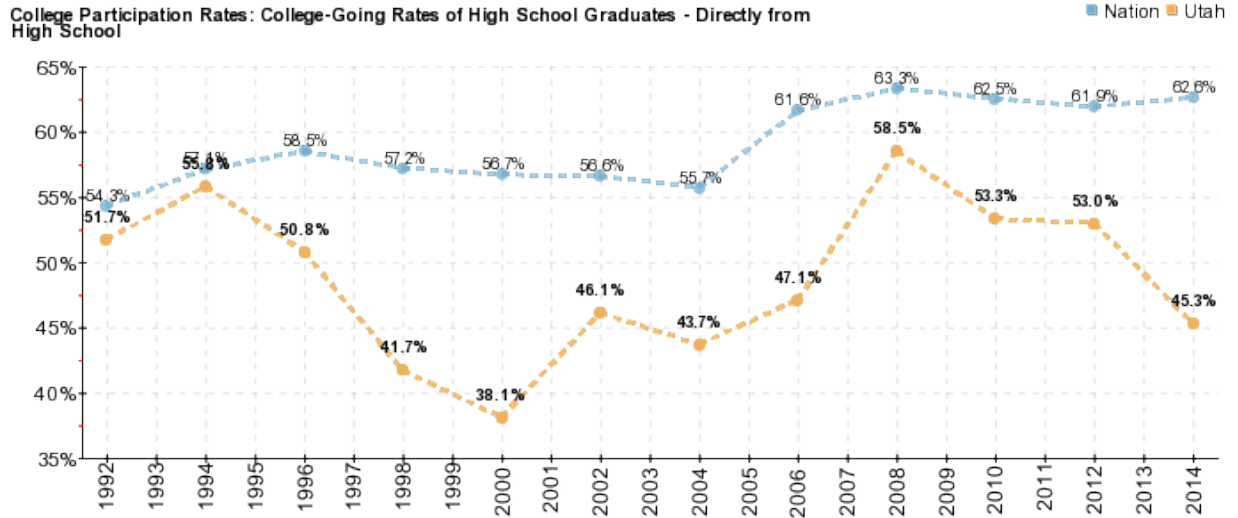
Six-County and Wasatch Front HS Student Enrollments



Source: <https://www.schools.utah.gov/data/reports>

Demand for Undergraduate Education

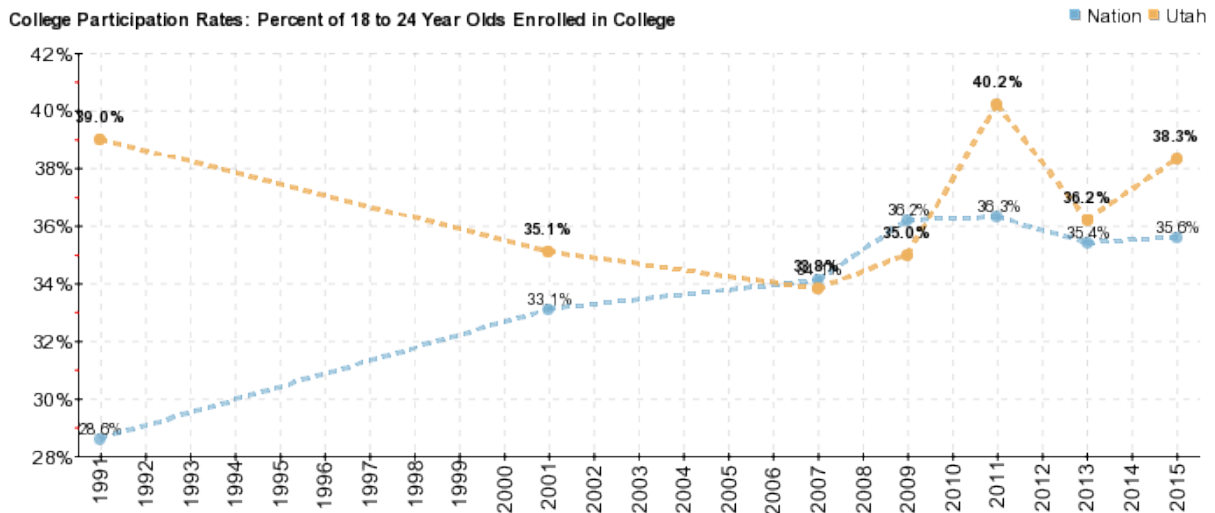
The college participation rates of high school graduates directly from high school has increased nationally. For Utah, the rates have lagged behind national averages with a notable decrease since 2012. This decrease can be attributed to the Church of Jesus Christ of Latter-day Saints’ missionary age change (2012-2013).



Source: NCHEMS Information Center.

<http://www.higheredinfo.org/dbrowser/index.php?submeasure=63&year=2014&level=nation&mode=data&state=0#/-1/>

The college participation rate for 18 to 24 year olds shows a different trend. Nationally, rates have steadily increased while Utah's rates have declined. Since 2007, Utah's rates have increased with highs of 40.2% (2011) and 38.3% (2015).



Source: NCHEMS Information Center.

<http://www.higheredinfo.org/dbrowser/index.php?submeasure=63&year=2014&level=nation&mode=data&state=0#/-1/>

In fall 2015, 38% of all undergraduate students attended two-year community colleges. Of all full-time undergraduate students, 24% were enrolled at either a public or private community college. An analysis of Educational Longitudinal Study (ELS: 2002-2006) data showed that 44% of low-income students (family incomes less than \$25,000 per year) attended community colleges as their first college after high school and 38% of all first-generation students choose a community college as their first institution. In contrast, only 15% of high-income students and 20% of students whose parents had post-secondary degrees started at a two year college⁵. At Snow College, 17% of the undergraduate population are first-generation students, which has increased from 2% in 2010.

34%

First-generation students at Snow College

General Population Shifts and Changes

The table below shows the top 10 counties for undergraduate enrollment at Snow College, excluding high school concurrent enrollment students. All counties have population growth with significant changes in Utah, Davis, Tooele, and Cache counties. The percent of individuals 18 years or younger is higher than the national average (22.8%). The percent of individuals with a high school diploma or higher degree (i.e. post-secondary certificate or Associate’s degree) is also higher than the national average (87%) for all counties. The percentage of individuals with a Bachelor’s degree or higher is below the national average (30.3%) for Sanpete, Sevier, Juab, Weber, Tooele, and Millard counties. Four of those counties are a part of Snow College’s direct service area (Sanpete, Sevier, Juab, and Millard).

	2010 Population	2016 Population	% Change	% 18 Years or Younger	% HS Grad or higher, age 25 plus	% BA or higher, age 25 plus	Total Students (non-HS)	% Undergraduate
Sanpete	27,822	29,409	5.7%	26.5%	89.2%	19.5%	650	19.9%
Utah	516,640	592,299	14.6%	34.2%	93.6%	38.1%	642	19.6%
Salt Lake	1,029,566	1,121,354	8.9%	27.9%	89.8%	32.8%	518	15.8%
Sevier	20,802	21,267	2.2%	29.8%	89.4%	15.5%	332	10.1%
Davis	306,479	342,281	11.7%	32.8%	95.5%	35.4%	199	6.1%
Juab	10,246	11,010	7.5%	34.8%	92.1%	16.9%	101	3.1%
Weber	231,236	247,560	7.1%	28.8%	90.1%	23.3%	101	3.1%
Tooele	58,218	64,833	11.4%	33.5%	91.6%	20.8%	98	3.0%
Millard	12,503	12,694	1.5%	31.0%	89.7%	19.8%	95	2.9%
Cache	112,656	122,753	9.0%	30.7%	93.0%	36.3%	94	2.9%
Utah	2,763,885	3,101,833	12.2%	30.2%	91.5%	31.7%		
United States	308,745,538	325,719,178	5.5%	22.8%	87.0%	30.3%		

Source: <https://www.census.gov/quickfacts/fact/table/US/PST045217>

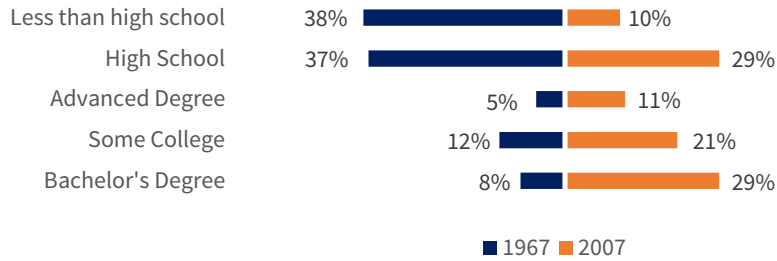
National and State Business and Industry

The United States is in a post-industrial service economy. In 1967, more than half of Americans were employed in goods-producing industries (manufacturing, mining, agriculture, and construction). By 2007, those jobs had dropped to less than 19% of the workforce, motivating people to improve their level of education in order to

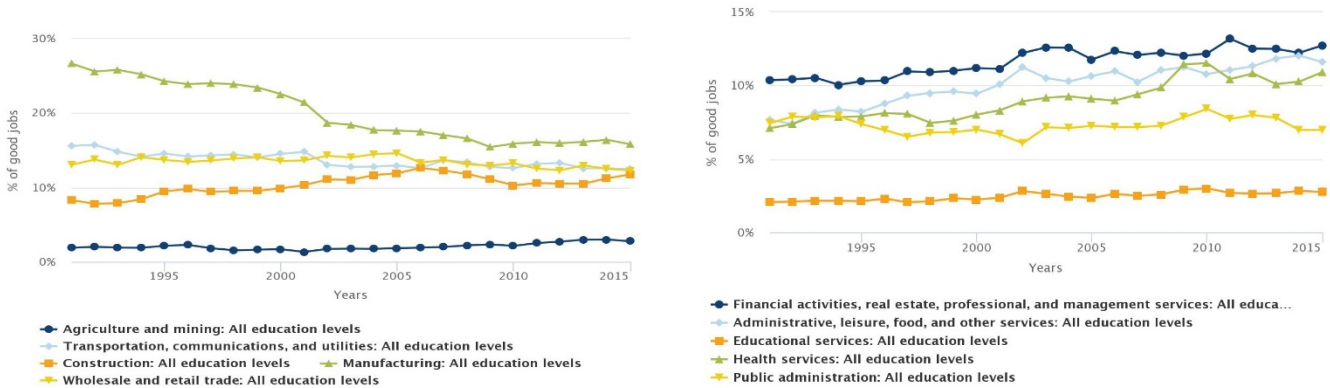
⁵ Community College FAQs on Community College Enrollment and Completion. Education Longitudinal Study (ELS: 2002-2006)

secure high-skill, high-wage jobs. The areas of greatest growth for U.S. employment has been in office and non-office settings such as hospitals and schools that require higher skills services⁶.

Workforce Educational Attainment



The U.S. economy’s largest and fastest growing sectors are business services, finance, healthcare, and education. In addition, advances in information technology and the escalation of a more complex and sophisticated consumer and production network has increased the demand for workers who can use technology. For example, in 1947 food and clothing represented 47% of economic consumption and only 18% by 2007.



Source: Georgetown University Center on Education and the Workforce analysis of data from the U.S. Department of Commerce, Bureau of Economic Analysis, Input-Output Accounts, 1947-2007.

Approximately 80% of the skill improvement in the American economy is the result of changes from mass production to customization of goods and services.

Today’s economy is no longer vanilla as variety, customization, and speed have become key competitive standards. New cars have a vast assortment of “bell-and-whistle” features, and the former world of only three TV networks has been replaced by cable and on-line streaming networks.

⁶ Georgetown University Center on Education and the Workforce analysis of data from the Economic Policy Institute, based on hourly earnings from the U.S. Census Bureau’s *Current Population Surveys*, 1973-2007.

Utah Business and Industry

Utah's non-agricultural employment increased by 2.7%, or 39,000 jobs between October 2016 and October 2017. The United States grew by 4.1%, or 2.0 million jobs during the same time period. The state's annual employment growth rate of 3.6% ranks Utah the strongest in the nation. Demographic advantages, an appealing business climate, and increasing labor force participation will continue to be an advantage for the Utah economy. Potential expansionary federal fiscal policy including tax cuts and infrastructure spending also present an upside risk. All going well, Utah's economy will once again be one of the top performing economies in the nation in 2017.⁷



Source: Utah Informed—Visual Intelligence for 2017. David Eccles School of Business and Kern C. Gardner Policy Institute analysis of Bureau of Labor Statistics data.

- The state's labor supply is ranked third in the country as part of its recent recognition as the #1 Best State for Business by Forbes Magazine.⁸

- The Provo-Orem area is among the top three regions that have led the country in percentage of job growth in both healthcare and IT jobs requiring community college training since 2001.⁹

- By 2017, an estimated 2.5 million new middle-skill jobs—requiring some type of postsecondary training—will be added to the workforce in the United States, accounting for nearly 40% of all job growth. The Salt Lake Metropolitan area is one of four regions in the country where livable-wage, middle-skill jobs requiring postsecondary training will be the primary driver for overall job growth.¹⁰ These middle-skill jobs are expected to account for nearly half of all new jobs.

- The Georgetown Center on Education and the Workforce projected by 2018, 66% of all jobs in Utah would require some type of postsecondary training. This led to the state of Utah setting an aspirational attainment goal of 66% of Utah adults having a degree or certificate by the year 2020.¹¹

⁷ 2017 Economic Report to the Governor, prepared by the Utah Economic Council. <http://gardner.utah.edu>.

⁸ "Best States for Business". *Forbes*, October 21, 2015. Utah topped the list for the second time in a row in 2015, and the fifth time since 2010. <http://www.forbes.com/places/ut/>. As cited by Utah: A State of Opportunity: Utah State Board of Regents Strategic Plan 2025.

⁹ *Middle-skill Spotlight: An analysis of four in-demand sectors with a community college focus*. Economic Modeling Specialists Intl., 2014. <http://www.economicmodeling.com/cc-report2014/>. As cited by Utah: A State of Opportunity: Utah State Board of Regents Strategic Plan 2025.

¹⁰ Webster, MaryJo. "Where the jobs are: The new blue collar." *USA Today*, September 30, 2014.

<http://www.usatoday.com/story/news/nation/2014/09/30/job-economy-middle-skill-growth-wage-blue-collar/14797413/>. As cited by Utah: A State of Opportunity: Utah State Board of Regents Strategic Plan 2025.

¹¹ A State of Opportunity: Utah State Board of Regents Strategic Plan 2025.

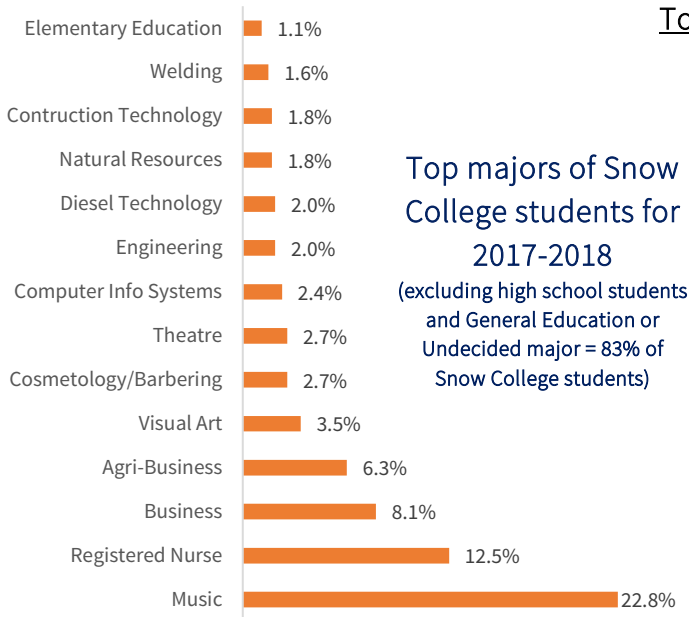
Utah’s largest employers are in the areas of health care, government, higher education, and public education.

Company	Industry	Jobs
Intermountain Healthcare	Health Care	20,000 +
State of Utah	State Government	20,000 +
University of Utah (incl. hospital)	Higher Education	20,000 +
Brigham Young University	Higher Education	15,000 to 19,999
Wal-Mart Associates	Warehouse Clubs/Supercenters	15,000 to 19,999
Hill Air Force Base	Federal Government	10,000 to 14,999
Davis County School District	Public Education	7,000 to 9,999
Granite School District	Public Education	7,000 to 9,999
Utah State University	Higher Education	7,000 to 9,999
Smith’s Good and Drug Centers	Grocery Stores	7,000 to 9,999
Alpine School District	Public Education	7,000 to 9,999
U.S. Department of Treasury	Federal Government	5,000 to 6,999
Jordan School District	Public Education	5,000 to 6,999
Salt Lake County	Local Government	5,000 to 6,999
Utah Valley University	Higher Education	5,000 to 6,999
U.S. Postal Service	Federal Government	4,000 to 4,999
Zions Bank Management Services	Banking	4,000 to 4,999
The Canyons School District	Public Education	4,000 to 4,999
Home Depot	Home Centers	4,000 to 4,999

Source: Utah Department of Workforce Services

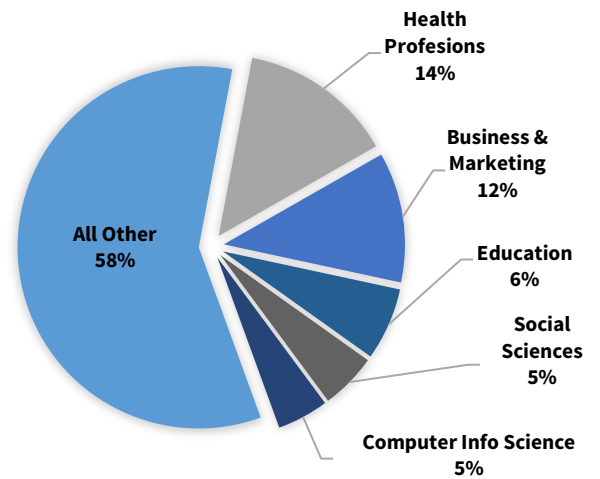
Top Majors for Utah Undergraduates

Health Professions (Nursing and related programs) and Business (Management, Marketing and related programs) are among the top majors for undergraduates in Utah’s public institutions (at the two-year and four-year degree level).



Top majors of Snow College students for 2017-2018 (excluding high school students and General Education or Undecided major = 83% of Snow College students)

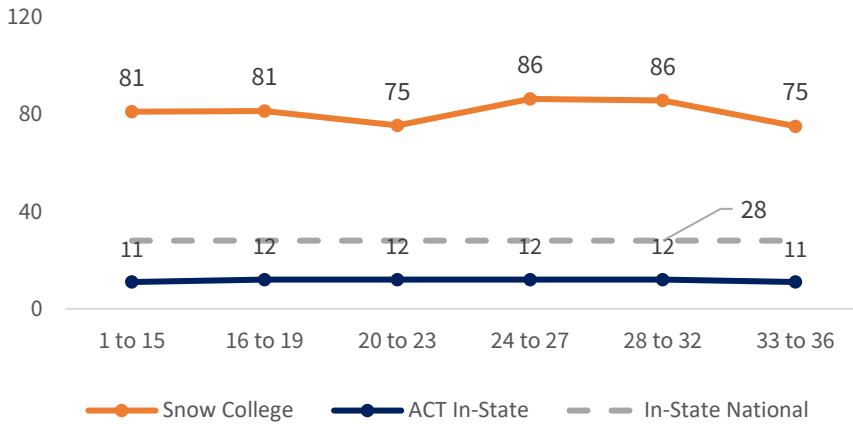
Top five undergraduate degrees for USHE students



Source: Utah Informed: Visual Intelligence for 2017. <https://issuu.com/ecclesschool/docs/ui2017complete>

Student Mobility by Academic Achievement

The majority of incoming freshmen attending four-year public colleges and universities enroll within 50 miles of their home. At public four-year colleges, the median distance students live from home is 18 miles. That number is 46 miles for private nonprofit four-year colleges, and only eight miles at public two-year colleges.¹² Snow College mirrors current trend data with significantly higher median distances, some of which can be attributed to Utah’s geographically large landscape.

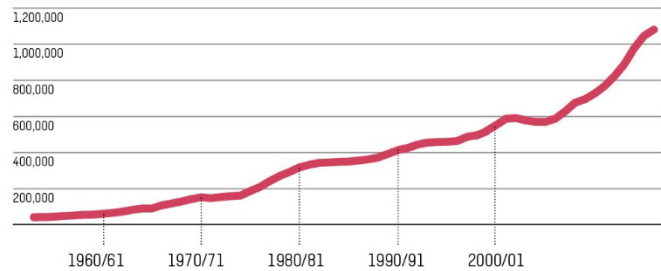


Student Mobility by Academic Achievement: Median Distance from Enrolled Students' Home to College by ACT Composite Score

International Student Profile

The number of international students studying in the United States increased by 3.4% for the 2016-2017 academic year. International student enrollment at Associate degree-granting colleges increased by 1.4%. Incidentally, international students enrolling for the first time (as first-time freshmen) declined by 3%. The majority of these students came from East Asia and the Pacific followed by Western European countries. The top three fields of study for these students are STEM (25%), Business (21%) and Social Sciences (17%).¹³ Utah ranks 30th out of all 50 states (in addition to Washington D.C.) in the number of international students. The University of Utah has the largest concentration of international students followed by Brigham Young University, Utah State University, Utah Valley University, and Latter-Day Saints Business College. The leading place of origin for in-state international students is China.¹⁴

INTERNATIONAL STUDENTS IN THE U.S. 1953/54 – 2016/17



In 2016/17 there was an increase of **3.4%** over the prior year in the number of international students in the United States.

¹² Hillman, Nicholas, and Taylor Weichman. 2016. *Education Deserts: The Continued Significance of "Place" in the Twenty-First Century*. Viewpoints: Voices from the Field. Washington, DC: American Council on Education.

¹³ <https://www.iie.org/Research-and-Insights/Open-Doors/Fact-Sheets-and-Infographics/Infographics>

¹⁴ Source: Open Doors: Report on International Educational Exchange, published annually by IIE with support from the U.S. Department of State's Bureau of Educational and Cultural Affairs. For more information, including press releases on foreign students in the U.S. and U.S. study abroad, and FAQs, including definitions of foreign students and foreign scholars, visit www.iie.org/opendoors or contact IIE's Public Affairs office at: +1(212) 984-5380.

COST AND AFFORDABILITY

National Policy/Regulatory Impact

In May 2017, the Trump administration released its budget proposal for the 2018 fiscal year. Proposed budget cuts to federal education programs exceeded \$10 billion. In addition, the budget would eliminate loan forgiveness programs, Stafford Loans, Supplemental Educational Opportunity Grants; cut the Federal Work-Study program in half; and allow the Perkins Loan program to expire. Cuts to the Federal Work-Study program will have an impact on Snow College’s low-income and first-generation students (the majority of our service area students). The loss of Perkins Loan dollars may impact many of our CTE programs.

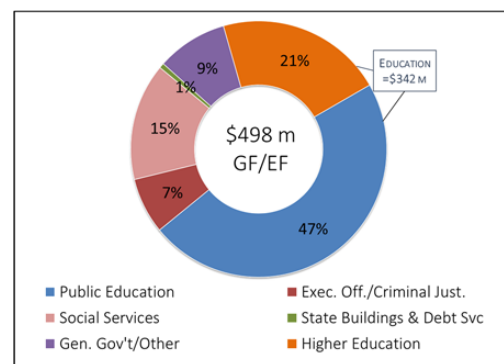
Of benefit to students is a proposed year-round Pell Grant. However, without measures to adjust for inflation the value of the Pell grant will decline. Simplification of FASFA by a reduction of the number of questions, the utilization of only prior year income on the form, and the idea of a “one grant, one loan, one work program” may result in colleges competing for attention among other non-educational budget priorities. A proposed single income-driven repayment plan caps monthly payments at 12.5% with remaining balances being forgiven after 15 years or repayment for undergraduate borrowers and 30 years for graduate borrowers.¹⁵

For Utah, higher education continues to play a role in the economic and workforce development of the state. Utah lawmakers will continue to focus on traditional higher education issues such as performance-based funding and dual (concurrent) enrollment. Other policy concerns such as campus sexual assault (and pending changes to Title IX compliance), immigration, and academic/free speech will also demand attention. With a growing high school and post-secondary Hispanic population, Utah lawmakers are mindful of changes to DACA, noting that leaders of community colleges in California are promising not to cooperate with federal immigration officials if DACA is terminated.¹⁶

Utah State Funding

Utah’s fiscal year (FY) 2017 netted \$16.2 billion from all resources (a 3.3% over the revised FY 2017 estimates). Education spending accounted for the largest share new money appropriated during the 2017 General Session. More than two-thirds of available statewide dollars was utilized to support public and higher education. Higher education received 21% of that allocation.

During the 2017 General Session, legislators approved \$3.5 million for enrollment growth and \$3.1 million for Student Athlete Graduation Improvement, each of which directed additional funds to Snow College. This resulted in an additional \$1,092,500 added to Snow College’s annual appropriation.¹⁷



¹⁵ Harris, Adam. What Trump’s Proposed 2018 Budget Would Mean for Higher Ed. The Chronicle of Higher Education. <https://www.chronicle.com/blogs/ticker/what-trumps-proposed-2018-budget-would-mean-for-higher-ed/118577>

¹⁶ <https://edsources.org/2017/education-issues-to-watch-in-2017-and-a-guess-on-what-to-expect/574483>

¹⁷ Budget of the State of Utah and Related Appropriations, 2017-2018. A Report on the Actions of the Utah State Legislature, 2017 General Session. <https://le.utah.gov/interim/2017/pdf/00002431.pdf>

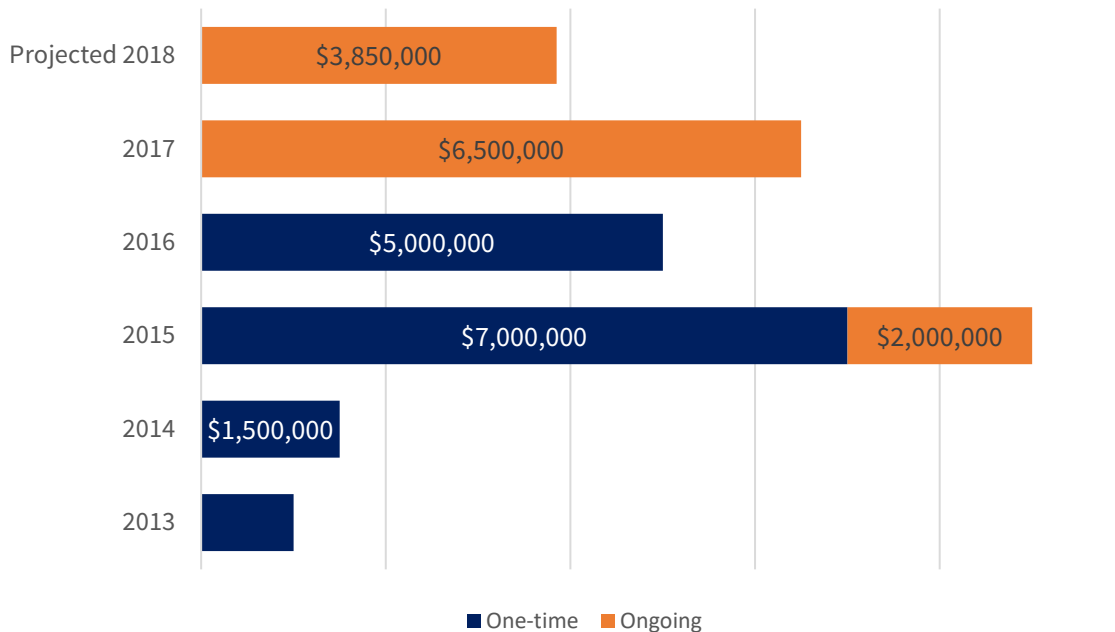
First established in 2013, higher education Performance Funding was a one-time basis subsidy, making it a challenge for institutions to fund ongoing initiatives that drive improved performance. In the 2017 legislative session, a revised performance funding, outcomes-focused model was passed that established the Performance Funding Restricted Account (S.B. 117—Higher Education Performance Funding by Millner/Wilson). The account is funded from 14% of the estimated revenue growth from targeted jobs in FY 2019, and 20% in FY 2020 and thereafter. Starting in 2018, future funding to his account is dependent on revenue growth of Utah’s targeted “5-Star” jobs as defined by the Department of Workforce services. Also in 2018, the Utah System of Technical Colleges (UCAT) will be granted 10% of the funding increase from the Performance Funding Restricted Account.

The Legislature determines to send those funds to institutions that have met the required performance metrics set by the Board of Regents. Those metrics and respective weightings are as follows:

- Completion (15%): degrees and certificates awarded
- Completion by underserved students (10%): degrees and certificates awarded to underserved students
- Responsiveness to workforce needs (25%): degrees and certificates awarded in high market demand fields
- Institutional efficiency (50%, 40% for research institutions): degrees and certificates awarded per full-time student.
- Research (10% for research institutions): total research expenditures

Research institutions are noted as the University of Utah and Utah State University.¹⁸

Performance Funding 2013-2018



Source: <https://higheredutah.org/higher-ed-appropriations-approves-performance-funding-model/>

¹⁸ <https://le.utah.gov/interim/2017/pdf/00004475.pdf>

Undergraduate Tuition and Fee Comparison

Snow College is the least expensive of all 8 USHE institutions for resident students and the second least expensive for non-resident students. Resident tuition and fees for two semesters at 15 credit hours each is \$3,692; non-resident expenses are \$12,382 (SLCC non-resident = \$12,020).

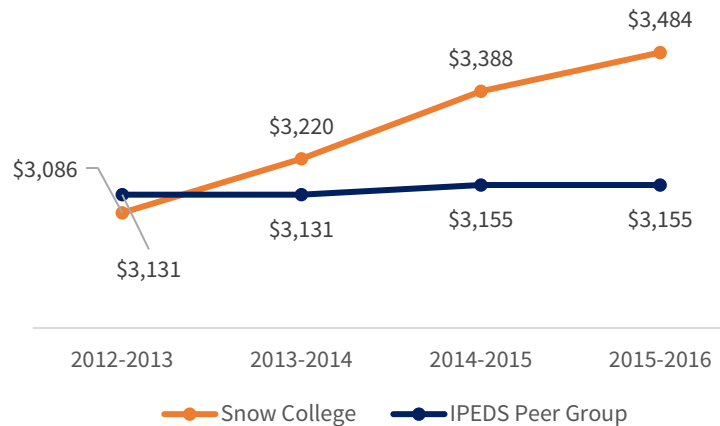
	2015-2016		2016-2017		% Change	
	Resident	Non-Resident	Resident	Non-Resident	Resident	Non-Resident
University of Utah	\$8,197	\$26,022	\$8,518	\$27,039	3.9%	3.9%
Utah State University	\$6,664	\$19,133	\$6,866	\$19,772	3.0%	3.3%
Weber State University	\$5,339	\$14,252	\$5,523	\$14,749	3.4%	3.5%
Southern Utah University	\$6,300	\$19,132	\$6,530	\$19,810	3.7%	3.5%
Snow College	\$3,484	\$11,676	\$3,592	\$12,070	3.1%	3.4%
Dixie State University	\$4,620	\$13,206	\$4,840	\$13,855	4.8%	4.9%
Utah Valley University	\$5,386	\$15,202	\$5,350	\$15,690	-0.7%	3.2%
Salt Lake Community College	\$3,568	\$11,020	\$3,689	\$11,728	3.4%	6.4%

IPEDS Tuition and Fee Comparison

Snow College’s tuition and fees for all first-time degree/certificate seeking undergraduates was lower than the national peer group for 2012-2013 (lower by 1.4%). By 2015-2016, Snow College’s tuition and fee expenses were 10% higher than the peer group.¹⁹

The IPEDS peer comparison group uses Snow College’s institutional characteristics such as:

- Degree-granting four-year, primarily Associate degree
- Carnegie classification of Associate’s Dominant
- Public, state-funded
- Similar enrollment/size



The following schools represent the 2015-2016 peer group:

Bellevue College (Bellevue, WA) Broward College (Fort Lauderdale, FL) Clark College (Vancouver, WA) Clover Park Technical College (Lakewood, WA) College of Central Florida (Ocala, FL) College of Southern Nevada (Las Vegas, NV) Columbia Basin College (Pasco, WA) Darton State College (Albany, GA) Eastern Florida State College (Cocoa, FL) Georgia Highlands College (Rome, GA) Green River College (Auburn, WA) Gulf Coast State College (Panama City, FL) Highline College (Des Moines, WA) Madison Area Technical College (Madison, WI) Miami Dade College (Miami, FL) North Seattle College (Seattle, WA) Oklahoma State University-Oklahoma City (Oklahoma City, OK) Olympic College (Bremerton, WA) Palm Beach State College (Lake Worth, FL) Pasco-Hernando State College (New Port Richey, FL) Pensacola State College (Pensacola, FL) Saint Johns River State College (Palatka, FL) Santa Fe College (Gainesville, FL) Schoolcraft College (Livonia, MI) Seattle Central College (Seattle, WA) Seminole State College of Florida (Sanford, FL) South Seattle College (Seattle, WA) South Texas College (McAllen, TX) State College of Florida-Manatee-Sarasota (Bradenton, FL) Valencia College (Orlando, FL) Vincennes University (Vincennes, IN)

¹⁹ IPEDS Data Feedback Report 2016 for Snow College. https://nces.ed.gov/ipeds/DataCenter/DfrFiles/IPEDSDFR2016_230597.pdf

Snow College's Comparative Affordability

Using annual resident tuition with off-campus room and board expenses, Snow College students can expect to pay 28% less than the average cost at any other state institution. Students who enroll and stay one semester at Snow College will save up to \$2,747 and students who stay for a full year have an estimated savings of \$5,494. These cost-savings include tuition, fees, housing, books, and other costs associated with college attendance. In other words, students who choose to attend Snow College their first college semester can save nearly enough money to pay for a second college semester. The following table uses the 2015-2016 cost of attendance data as reported to the Integrated Post-Secondary Data System (IPEDS), Institutional Characteristics component. Note that the total cost of attendance is not the sum of resident tuition and off-campus room and board. The total cost of attendance includes books, gas, groceries, and other costs distinctly reported by each institution.

Annual Cost of Attendance	Resident Tuition	Off-Campus R&B	Total Cost
Utah State University	\$7,426	\$7,800	\$19,886
Weber State University	\$5,523	\$8,000	\$19,775
University of Utah	\$8,518	\$9,936	\$23,364
Utah Valley University	\$5,530	\$5,960	\$15,900
Southern Utah University	\$6,530	\$7,500	\$20,430
Dixie State University	\$4,840	\$5,615	\$19,363
Snow College	\$3,582	\$5,000	\$14,292
Average Cost*	\$6,395	\$7,469	\$19,786
Difference/Savings	-\$2,813	-\$2,469	-\$5,494
Percent Difference	-44%	-33%	-28%

*The average cost does not include the cost to attend Snow College

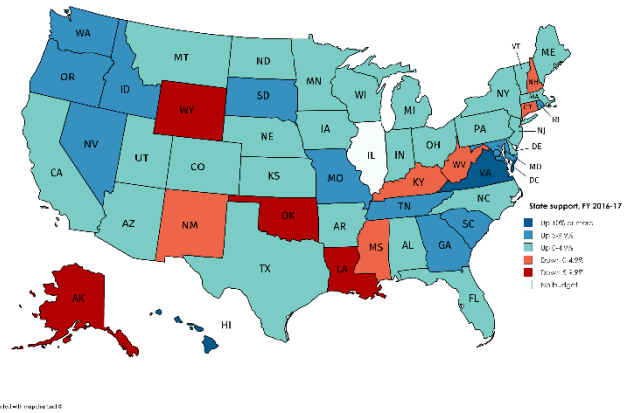
Snow College Tuition and Fees—one semester	\$1,791	The cost savings the first semester will almost pay for a second semester's worth of tuition and fees.
USHE Average Tuition and Fees—one semester	\$3,197	
Cost Savings	\$1,406	
Snow College Off-Campus Housing—one semester	\$2,500	The cost savings will pay for nearly half (49%) a second semester off-campus housing contract
USHE Average Off-Campus Housing—one semester	\$3,734	
Cost Savings	\$1,234	

Source: College Navigator—National Center for Education Statistics. <https://nces.ed.gov/collegenavigator/>

It is noted that this information does not apply tuition waivers or other forms of institutional financial support. However, the waiver amount can be applied to support the dollar value of attending Snow College compared to any other in-state institution. For example, a student offered a \$2,000 waiver at any other institution would still pay less (on average) by attending Snow College (e.g. average cost \$6,395 – the \$2,000 waiver = \$4,395. Snow College annual tuition--without any waiver--is a savings of \$813).

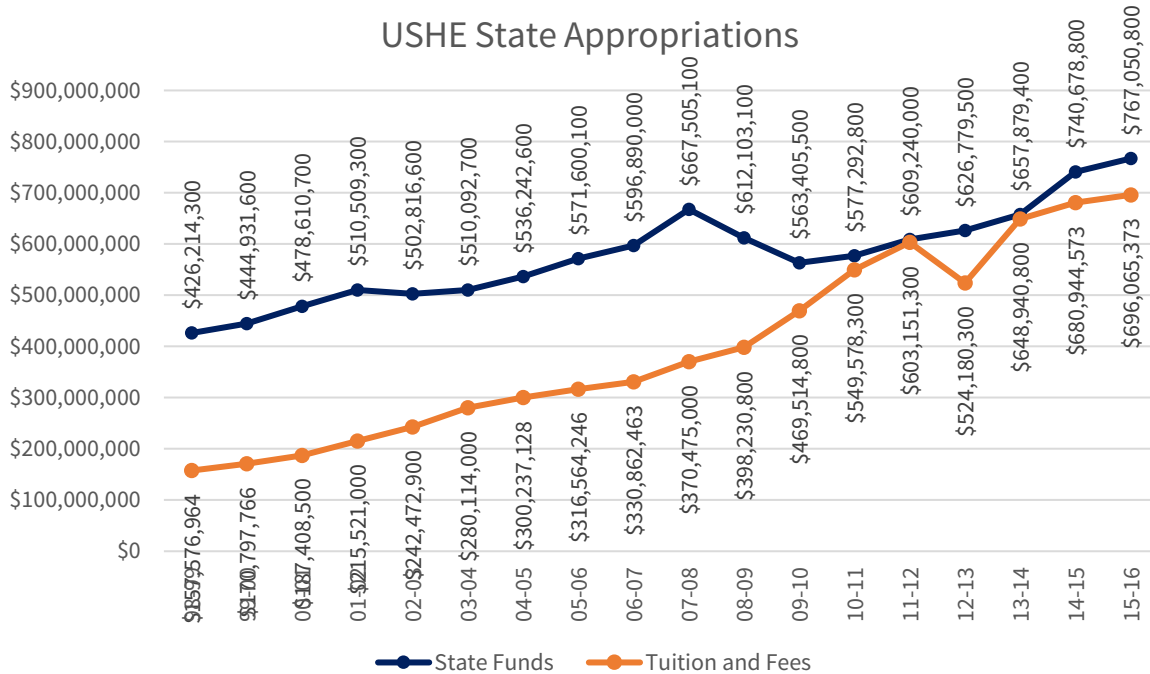
National Trends in Higher Education Appropriations

Appropriations for higher education rose moderately during the 2016-2017 (up 3.4%) fiscal year with more than three-quarters (n = 39) of states posting increases. The increase is an indication that most states are willing to fund higher education which a significant shift from prior years of widespread cutbacks. The smallest state increase was in Colorado and Wisconsin (.2%); the largest was in Hawaii (10.5%). In Utah, higher education support increased 4.9% (\$978,663,600). The five year change in funding (including stimulus funding) for Utah is an increase of 34.3%.²⁰



Utah Higher Education Appropriations

State funding for higher education has increased over the past 17 years. Total appropriations, including tuition, have maintained pace with higher education inflation as measured by the Higher Education Price Index (HEPI). The mix of state appropriations and tuition dollars has been inconsistent since FY 1999. For example, during the Great Recession, state appropriations slowed and the difference was made up by tuition dollars. Since FY 2011, however, legislators have accelerated tax funding. Utah continues to be among the most affordable states in the nation for higher education with new initiatives by the Utah System of High Education and continued legislative efforts directed toward curbing tuition growth.²¹



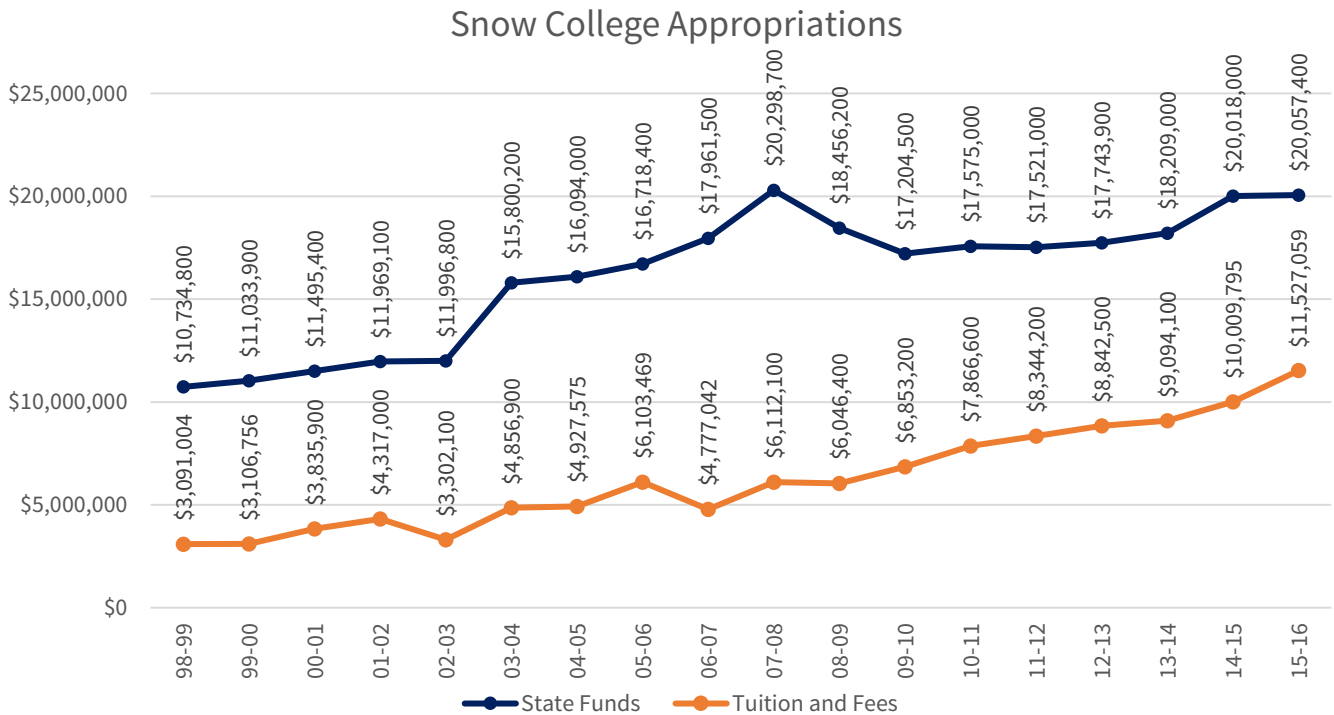
Source: Pratt, Spencer. Utah State Legislature 2016 Interim Issue Brief: Higher Education Funding.

²⁰ <https://www.insidehighered.com/news/2017/02/06/states-report-34-percent-increase-higher-education-appropriations>

²¹ Pratt, Spencer. Utah State Legislature 2016 Interim Issue Brief: Higher Education Funding.

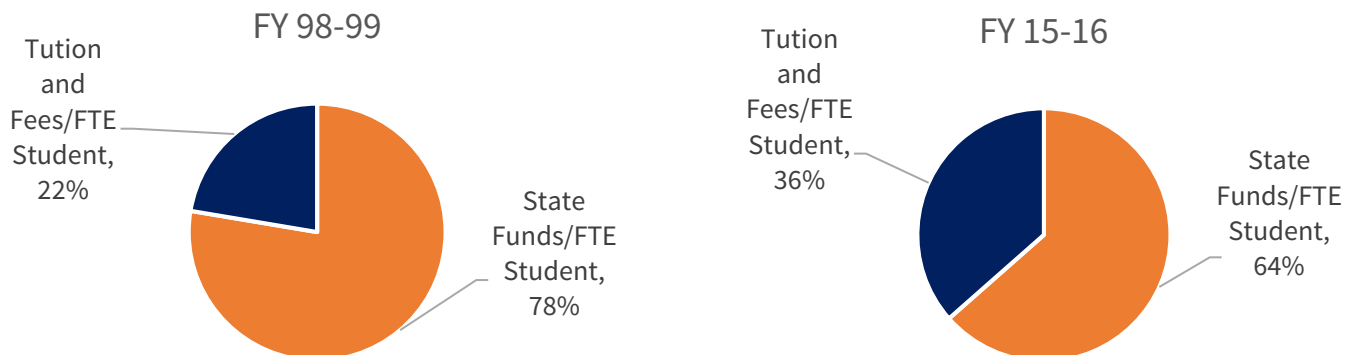
Snow College State Appropriations

For FY 98-99, the state of Utah made up two-thirds of Snow College’s appropriation (78%). By FY 0708, Snow College received its highest allocation from the state legislature--\$20,298,700. Recession-fueled budget cuts and a slow turn-around to the economy reduced Snow College’s state funding by up to -15%. Beginning FY 1314, the state of Utah dedicated increased funding to higher education and, by FY 1516, Snow College received \$20,057,400 tax dollars, which was (\$241,300) short of the FY 0708 peak. Tuition revenues along with the re-allocation of programs and general fund resources have compensated for the lack of state funding. For FY 1617, only 65% of Snow College’s operating budget is comprised of state tax dollars.



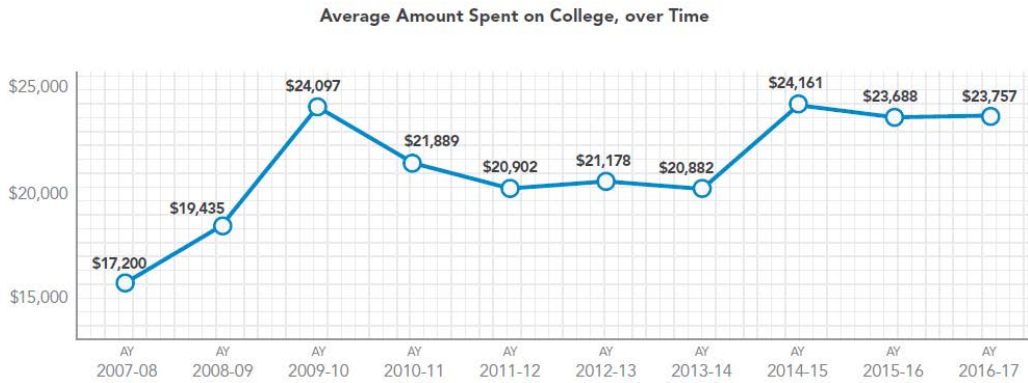
Source: Pratt, Spencer. Utah State Legislature 2016 Interim Issue Brief: Higher Education Funding.

Sources of General Fund and Operating Revenue

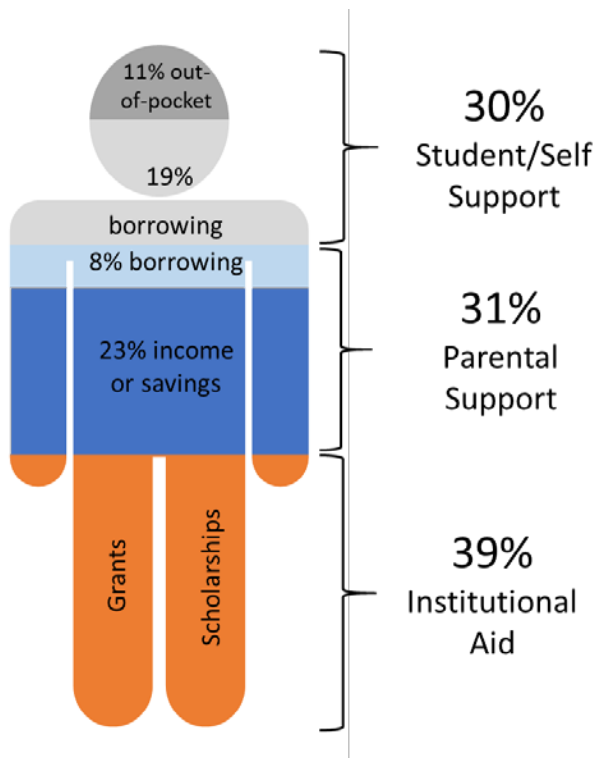


How Undergraduates Finance Their Education

Though not a direct increase, the cost for college has increased by 38% over the past 10 years. How America Pays for College 2017 found that families paid about the same for college in 2016-2017 as they did they prior year, but the balance of resources used to pay shifted. For the 2016-2017 academic year, families paid \$23,757 which was similar to the \$23,688 spent during the 2015-2016 year.



Source: How America Pays for College 2017



The 2017 report noted that scholarships and grants paid the largest portion of college expenses, after which students and parents paid an equal share.²² Despite paying an equal share, students borrowed more money to pay for college: 11% came from out-of-pocket funds and 19% from borrowed funds compared to 12% and 19% for 2015-2016, respectively. For the 2016-2017 academic year the money breakdown for college resulted in

- \$8,390 in scholarships and grants
- \$901 from relatives and/or friends
- \$5,527 from parent income or savings
- \$1,819 from parent borrowing
- \$4,551 from student borrowing
- \$2,569 from student out-of-pocket

Interestingly, although college savings plans have been in effect since 1996, only a small portion of families use them to pay for college. Thirteen percent of families used them in 2016-2017, which was down from nineteen percent the previous year. Families that used the 529 plan paid

average dollar amounts of \$10,031. Additionally, 86% of families completed the FASFA (up from 74% in 2008) and 76% of students work to help pay for college.²³

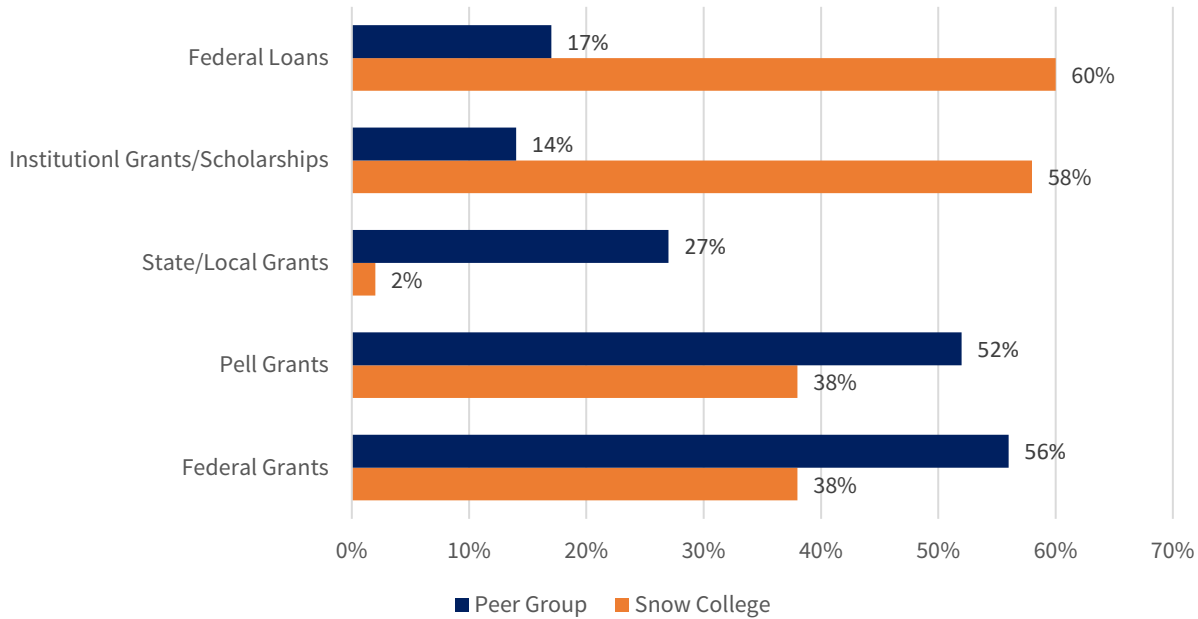
²² How America Pays for College 2017. Sallie Mae's 10th national study of college students and parents. Sallie Mae and Ipsos Public Affairs. SallieMae.com/HowAmericaPaysforCollege

²³ How America Pays for College 2017. Sallie Mae's 10th national study of college students and parents. Sallie Mae and Ipsos Public Affairs. SallieMae.com/HowAmericaPaysforCollege

How Snow College Students Pay for College

Snow College students use more institution grant or scholarship dollars and less federal grant money than their peers. Of full-time, first-time students, 58% of Snow College students took advantage of institution scholarships or grants (average amount = \$2,069) compared to the peer rate of 14% (average = \$1,796). Only 38% had federal grants, including Pell grants (average amount = \$4,352) compared to the peer rate of 52% for Pell Grants for a similar average award amount.

% of Aid for Full-Time, First-Time Freshmen



Source: U.S. Department of Education, National Center of Educational Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2015-16, Student Financial Aid component.

A little over half of Snow College student apply for any form of financial aid (52.7%). This is an increase over the 40% of students/families that completed the FASFA in 2008 but remains significantly lower than that national average of 86% for the 2016-2017 academic year²⁴.

National Trends in On-Line Education

*The Digital Learning Compass: Distance Education Enrollment Report 2017*²⁵ provides insight into how the growth of on-line course offerings and on-line degree programs and hybrid learning influence a strategic enrollment management plan. For example, findings indicate 30% of all 2015 enrollments took at least one distance education course (over 6 million students). These enrollments are 3.9% higher than previous enrollments with specific growth in occurring in public and private non-profit institutions. Notably, the proportion of students taking at least one on-line course in 2002 was under 10%.

²⁴ Source: U.S. Department of Education, National Center of Educational Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2015-16, Student Financial Aid component. Snow College Student Database (Banner) RPRAWRD table for respective fiscal years.

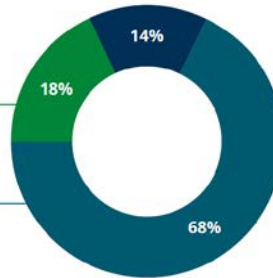
²⁵ I. Elaine Allen, Jeff Seaman (May 2017). *Digital Learning Compass Distance Education Enrollment Report 2017*. Babson Survey Research Group, e-Literate, and WCET.

The majority of distance education students are enrolled in undergraduate courses with public education hosting at least two-thirds of all distance education students.

Most distance learners in private institutions
attend not-for-profits.

Most distance learners
attend public institutions.

Public Private not-for-profit Private for-profit



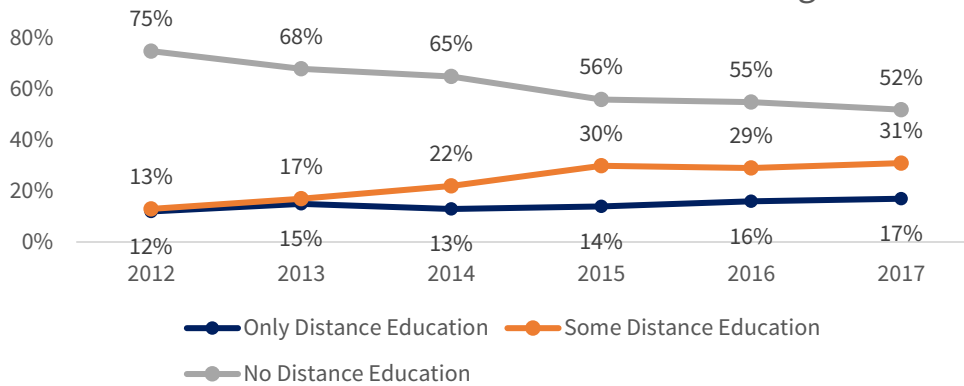
Most distance enrollments are at larger institutions—schools with 15,000 or more students comprise only 7% of all U.S. institutions but enroll over nine million (46%) of all students. These institutions also enroll the lion’s share of distance education students.

Source: <https://onlinelearningsurvey.com/reports/digitallearningcompassenrollment2017info.pdf>

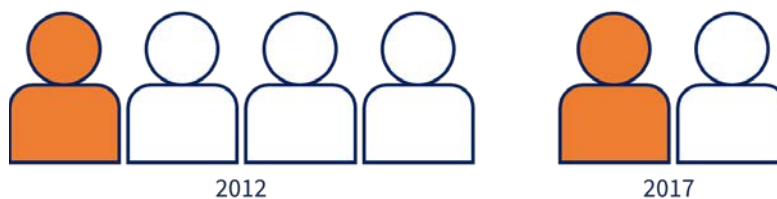
Students who take exclusively distance courses live within the same state as their institution; however, 42% of students are studying at out-of-state institutions. Of undergraduate students in the state of Utah, 67% did not enroll in any distance education course, 20% were enrolled exclusively in distance education courses, and 13% enrolled in at least one distance education course (fall 2012).

At Snow College, the number of students taking at least one distance education class has doubled from 13% (2012) to 31% (2017) while the number of students exclusively enrolled in distance education has remained relatively consistent (growing from 12% in 2012 to 17% in 2017). Many of Snow College’s distance education students are high school students enrolled in a concurrent enrollment class using interactive video conference technology.

Distance Education Trends at Snow College



Ratio of Snow Students Taking a Distance Course



Source: U.S. Department of Education, National Center of Educational Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter collection for 2012 to 2017, Fall Enrollment component.

Issues to Online Enrollment Growth Strategies

Many institutions view the consistent and positive growth of on-line education as a critical component of their enrollment management strategy. This is particularly true for institutions in states with declining high school enrollments. However, support for growth in on-line enrollment is not without its challenges.

Academic Concerns:

A persistent failure of on-line education has been the ability to convince faculty of its worth. According to the Babson Survey Research Group, only 29.1% of faculty accept the value and legitimacy of online education²⁶. This is more pronounced at small schools with limited distance education offerings.

Academic Leadership:

There has been a significant drop in the view of online education as a key element in long-term strategic enrollment goals. Particular to small schools (online < 5,000), there was a two-thirds decrease in academic administrative support from 2014 (70.2%) to 2015 (46.0%). Much of this reduction is attributed to schools with little or no distance or blended course offerings. Additionally, not all schools that report online education as a critical long-term enrollment strategy have it incorporated into their formal strategic plan.²⁷

Course Quality:

In 2003, 57.2% of academic leaders rated online education as good as or better than face-to-face instruction. By 2012, that percentage increased to 77%, but dropped slightly to 71.4% by 2015. Academic leaders at small institutions are less positive about the quality (23.2% reporting inferior), but by majority rate the quality of online and face-to-face learning as the same (61%).²⁸

Blended Learning:

Courses that mix online learning with face-to-face instruction hold more promise than full online courses. Ratings among academic leaders regarding the promise of blended or hybrid courses as higher to that of online courses increased from 39.2 (2002) to 42.3% (2015).²⁹

Student Retention:

One of the biggest concerns in online education is the excessively high attrition rates compared to traditional classes: as many as 40% to 80% of online students drop out of online classes.³⁰

²⁶ I. Elaine Allen, Jeff Seaman (May 2017). *Digital Learning Compass Distance Education Enrollment Report 2017*. Babson Survey Research Group, e-Literate, and WCET.

²⁷ The A•P•L•U-Sloan National Commission on Online Learning, *Online Learning as a Strategic Asset: A Survey of APLU Presidents and Chancellors*, The A•P•L•U-Sloan National Commission on Online Learning, *Online Learning as a Strategic Asset: A Survey of NAFEO Presidents and Chancellors*, and The A•P•L•U-Sloan National Commission on Online Learning, *Online Learning as a Strategic Asset: A Survey of AlHEC Presidents and Chancellors*.

²⁸ I. Elaine Allen, Jeff Seaman (May 2017). *Digital Learning Compass Distance Education Enrollment Report 2017*. Babson Survey Research Group, e-Literate, and WCET.

²⁹ I. Elaine Allen, Jeff Seaman (May 2017). *Digital Learning Compass Distance Education Enrollment Report 2017*. Babson Survey Research Group, e-Literate, and WCET.

³⁰ Smith, B. (2010). *E-learning technologies: A comparative study of adult learners enrolled on blended and online campuses engaging in a virtual classroom* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses database.

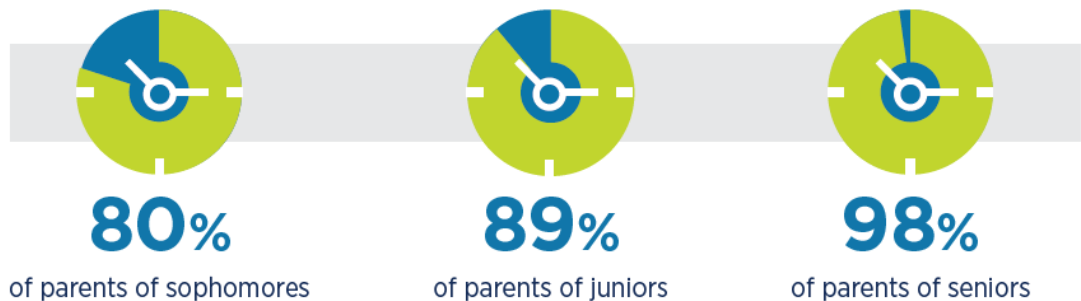
RECRUITING ENVIRONMENT

How Undergraduates Seek Information

Changing demographics in the number of high school students attending and graduating from college has changed the ways colleges and universities recruit first-time in any college student (FTIAC). More than ever, students **(AND THEIR PARENTS)** are conducting college searches using technology. Seventy-seven of all spring semester high school juniors and 82% of fall seniors ranked the college's website as their top resource for discovering colleges. In the most recent report on FTIAC behavior, Ruffalo Noel Levitz reports that 90% of parents contact at least one college on behalf of their high school student beginning the sophomore year.³¹

Parents become more engaged as the decision time gets closer

PERCENTAGE OF PARENTS THAT HAVE ACTED TO SUPPORT ENROLLMENT



Source: Ruffalo Noel Levitz 2017 E-Expectations Report: Discover the Keys to Greater Engagement with Both High School Students and Parents.

Additionally, the decision-making process has flipped—it is not about controlling the college information sent to prospective students as much as it is about providing a multi-channel information experience. The top five information resource categories are as follows:

1. College website: This was the top pick for sophomores, juniors, and seniors.
2. On-line Tuition Calculator: 2nd pick for seniors; 3rd pick for juniors.
3. Email Messaging: 2nd pick for juniors and sophomores; 3rd pick for seniors.
4. Videos (authentic classroom and campus videos): 4th pick for all classes.
5. Printed brochures: 3rd pick for sophomores; 5th pick for juniors and seniors.

For parents the top three picks were (1) websites, (2) financial aid calculators and (3) printed materials. Both students and parents will use the college's website to access the social media platforms sponsored by the college.




Today's potential students and parents have a variety of resources to find information on schools. The challenge for any institution is to develop effective engagement channels and great content strategy consistent with the respective parent or student information seeking behavior. Listed are key recommendations:

³¹ Ruffalo Noel Levitz 2017 E-Expectations Report: Discover the Keys to Greater Engagement with Both High School Students and Parents.

- **Make your messaging multichannel.** Students and parents will decide how and when to get the information they seek.
- **Invest in and maintain a Search Engine** because students will use that engine to find information on your website
- **Build a Strong Presence on College Planning Sites**—making sure the information is credible and up-to-date is just as important as the college brand.
- **Budget for Digital Ad Campaigns**—paid on-line ads should be a part of a college’s digital marketing mix and consistency is the key. Occasional online ads are ineffective.
- **Don’t underestimate the value of our online calculator**—each college should provide a net price calculator that takes only minutes to use. This calculator should at the same level and ease of access as information requests forms, admission application forms, and request forms for campus visits. The inclusion of a scholarship calculator makes this information ten times more effective.
- **Understand the difference in how parents and students use social media**—students want storytelling and high imagery typically found on Snapchat and Instagram. Parents remain more traditional by using Facebook.
- **Have good content across all social media platforms**—you should have mix and the each platform should be a valued use of information for students and parents.
- **Make sure the social media links are easy to find on your college’s website**—social media links should be in a very conspicuous location on an institution’s main homepage. Consideration should be given to hosting live feeds from social media on the homepage.³²

How Undergraduates Show College Interest

Students and parents signal interest in a college as early as the sophomore year. This interest continues to grow with 90% of parents and seniors reaching out to institution of interest.

	TOP 3 WAYS TO SHOW INTEREST	
 <p>SOPHOMORES 51% Students 33% Parents</p>	Sophomores	Parents of Sophomores
	--Request for Info on website --Email --List on standardized tests	--Request for Info on website --Register student for standardized tests --Visit Campus
 <p>JUNIORS 64% Students 49% Parents</p>	Juniors	Parents of Juniors
	--Request for info on website --List on standardized tests --Visit campus	--Request for info on website --Register student for standardized tests --Visit Campus
 <p>SENIORS 74% Students 90% Parents</p>	Seniors	Parents of Seniors
	--Visit campus --Request for Info on website --Email (tie) --List on standardized test (tie)	--Register student for standardized tests --Visit Campus --Request for Info on website

³² Ruffalo Noel Levitz 2017 E-Expectations Report: Discover the Keys to Greater Engagement with Both High School Students and Parents.

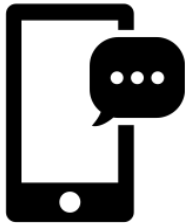
How information is communicated to students and parents has a huge impact on their college choice decision. The choice of communication is very important and social media apps are a part of the new mix.



Email is very important and is checked on a smart phone

- All students and parents (96-99%) check and use their email at least once a week (most using their smartphone)
- 80% of parents check email on a smartphone at least once a day
- 61% indicate they check email on their phone multiple times per day

This makes responsive emails very important, especially those that adapt to fit their different smartphone screens.³³



Students and parents are open to text messaging, but few receive texts from colleges

- 62-68% of students are open to receiving text messages
- 33-48% are receptive to texts sent via social media applications (seniors are the least receptive; sophomores are the most receptive)
- 58-78% have never received a text or app message from an institution.
- 59-69% of parents are open to receiving text messages (parents of seniors being the highest)
- 22-25% are open to a message sent via social media
- 82-89% of parents have not received a text or app message from an institution

There is a growing demand for text messaging to students and parents, but it is important that the messages stick to critical topics such as deadline reminders, acceptance notifications, and application details. Long and laborious texts will cause you to lose your audience as text subscribers.³⁴

³³ Ruffalo Noel Levitz 2017 E-Expectations Report: Discover the Keys to Greater Engagement with Both High School Students and Parents.

³⁴ Ruffalo Noel Levitz 2017 E-Expectations Report: Discover the Keys to Greater Engagement with Both High School Students and Parents.

How Snow College Students Show Interest

Snow College students do not differ from national norms. In January 2017, four distinct student focus groups discussed how Snow College can best use social media to retain and recruit students. The four groups represented new freshmen students (students who attend Snow College for the first time fall semester 2016), continuing students (students who had previously attended

Snow College the prior academic year), returning and transfer students (students with prior college experience either at Snow or another institution), and high school students (a group of students taking concurrent enrollment classes while attending Manti High School).³⁵ Among the comments, pictures and short, high-quality videos mattered a lot! The higher the picture or video quality the more they will be liked and shared among friends and followers (who may be prospective students). The top communication social media apps for Snow College students are (in order): Instagram, Snapchat, Twitter (mostly for news)



Students check their social media nearly every minute!



Students prefer pictures and videos over text.



Students access social media using their cell phones.

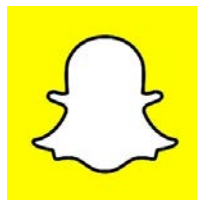
TAKEAWAY:

Students connect with Snow College using social media and their cell phones. These students prefer to get their information all the time via pictures and videos. The videos must be short (less than 20 seconds in length).



Instagram

Daily use for picture messaging, maintain contact with friends, and share moments (pictures) with others/followers.



Snap Chat

Daily used for pictures, messages, and stories with friends. Used more than text messaging for high school and new college students.



Twitter

Used daily for messages and to keep up with trending local, national, and/or global news stories



YouTube

Used for daily entertainment—watching trending videos or those posted by friends.



Facebook

Used for family information such as posting letters or for networking (like LinkedIn). Not checked daily.



Other apps

Used the same as Facebook for posting letters or networking. Not checked daily.

TAKEAWAY:

Students use Instagram or SnapChat on a daily basis to

maintain instant contact with friends and followers. Twitter and YouTube are also used daily for news and entertainment information. Facebook is used for letters and family information with less visiting the site because of all the advertisements—it has become like store.

“Facebook is for moms and none of us here are moms!”

³⁵ Snow College social Media Focus Group and Survey Findings, March 2017

Snow College Student Choice Information

For the 2017 entering student survey, 828 first-time students were asked how they first learned about Snow College. Sixty-six percent responded learning about Snow College from family or friends, most of whom previously attended the college. Other areas of influence consisted a high school visit from a Snow representative (19%), information received from a high school counselor (8%), attendance at a Snow College open hour (3%), a web-based search on colleges (3%), an direct email from Snow College (1%), and information obtained from a national publication like Wintergreen Orchardhouse or the Peterson Guide (less than 1%).



Snow College Enrollment Choice

Historically, the greatest influence on student enrollment was the academic reputation and the cost of the institution.³⁶ Starting in 2007, cost ranks as the single leading factor in a student’s choice to matriculate (69%) followed by size, scholarship offerings, and the ability to transfer to another school or four-year program.³⁷

Academic Reputation	10%
Size	12%
Location	10%
Scholarship Offer	10%
Cost	13%
Financial Aid Package	7%
Athletics/Activities	7%
Family Influence	7%
Peer Influence	9%
Ability to transfer to another school/program	11%

Snow College Enrollment Yields

Recruitment and enrollment yields compare the number of applicants and matriculated first-time, directly out of high school, students against state-wide high school graduating classes (high school graduating class information obtained by WICHE (Western Interstate Commission for Higher Education) data).³⁸ The five-year recruitment yield average is 13%. This means Snow College receives and admits only 13% of Utah’s high school graduating population. The five-year enrollment yield average is 5%. This means that Snow College enrolls only 5% of Utah’s high school graduation population as new, first-time freshmen.

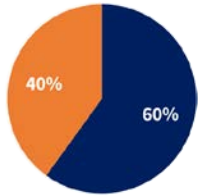
³⁶ Snow College Entering Freshman Survey, Fall 2006.

³⁷ Snow College Entering Freshman Survey, Fall 2010.

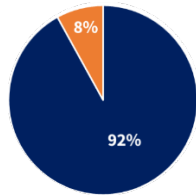
³⁸ <https://knocking.wiche.edu/data/>

Snow College Enrollment Profile

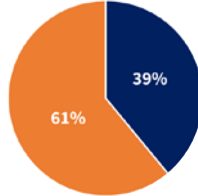
For Fall 2017, enrollment at Snow College was 5,563 students. 28% of the enrollment were first-time freshmen (20% coming directly from high school), and over one-third (34%) were high school students taking college courses for dual college and high school credit. In fall 2017:



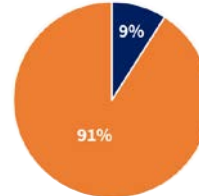
60% of all students were full-time; 40% were part-time



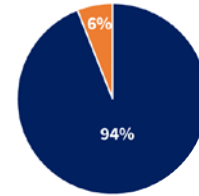
92% were Utah residents



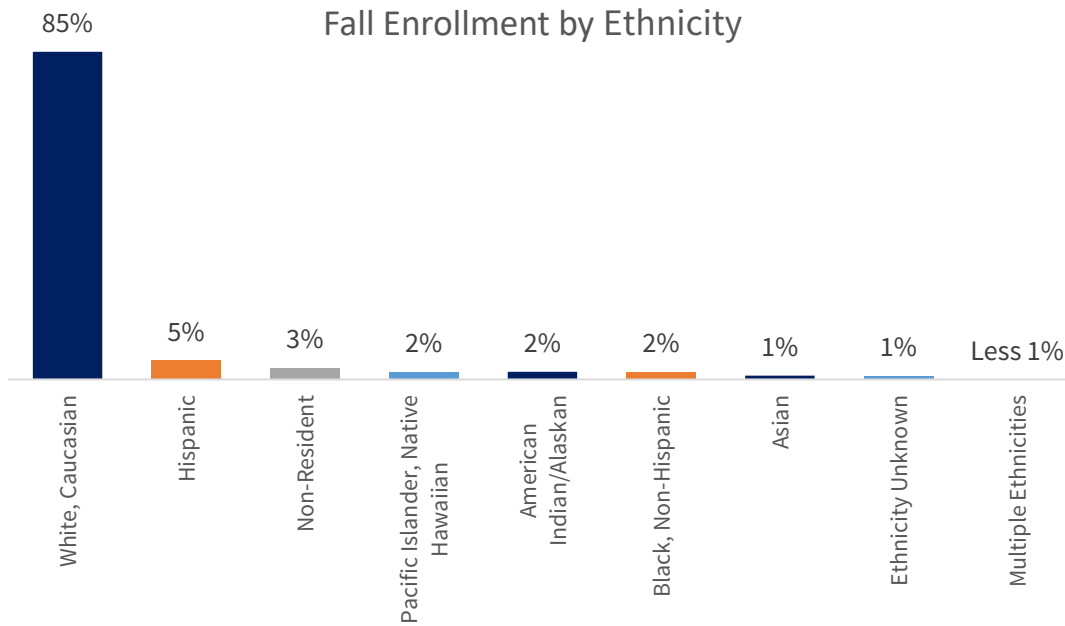
39% came from the 6-County service area



International students represented 9% of the student population



94% were age 24 years or younger (ave = 20 years)



Other Fall 2017 Information

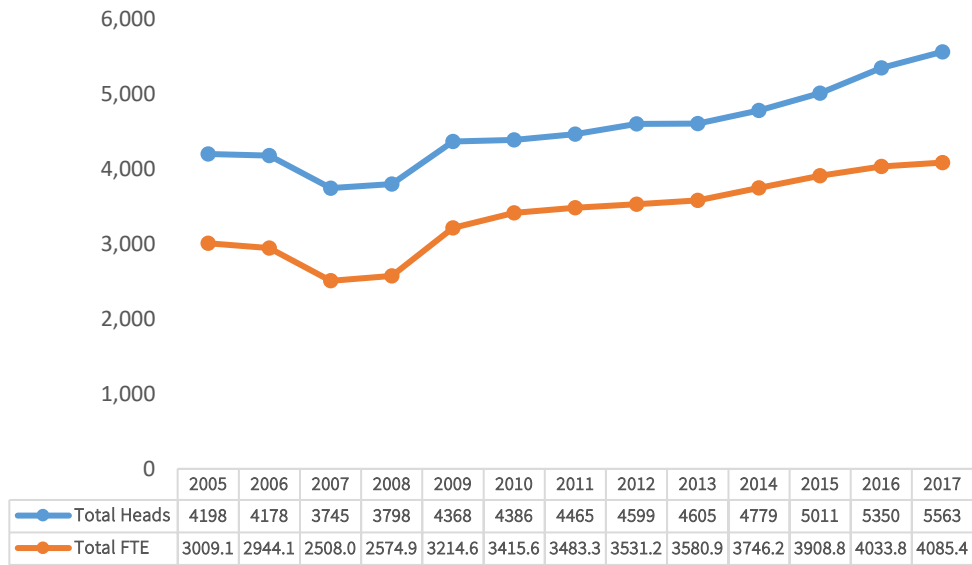
Fall Undergraduates by Type	Count	Percent	First-Time Freshmen Profile	
High School Students	1,887	34%	Directly from HS	1,086
First-Time Freshmen	1,554	28%	HS > 12 months	468
Continuing Students	1,590	29%	Average HS GPA	3.3
Returning Students	277	5%	Average ACT	20
Transfer Students	50	1%	Male/Female	629/925
Non Credit Students	205	3%	Full/Part	95%/5%
New freshmen students are represented by two categories: (1) those enrolled directly from high school or within 12 months of high school graduation and (2)			Minority	218
			International	25

those attending for the first time (no prior college) greater than 12 months from their high school graduation. First-time international students are part of this mix.

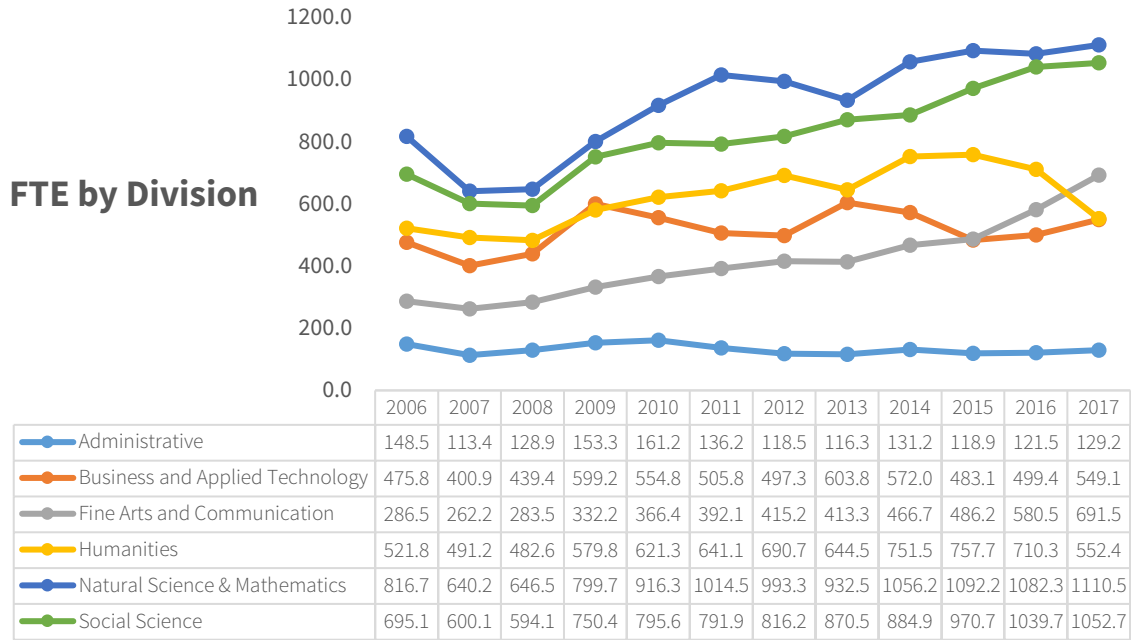
Snow College Enrollment Trends

Snow College student enrollment has steadily increased since 2008. Significant increases in student headcount since 2015 have been in high school concurrent enrollment students. This has created a larger gap between headcount and FTE with FTE driving the institution’s budget-related support.

Headcount and FTE



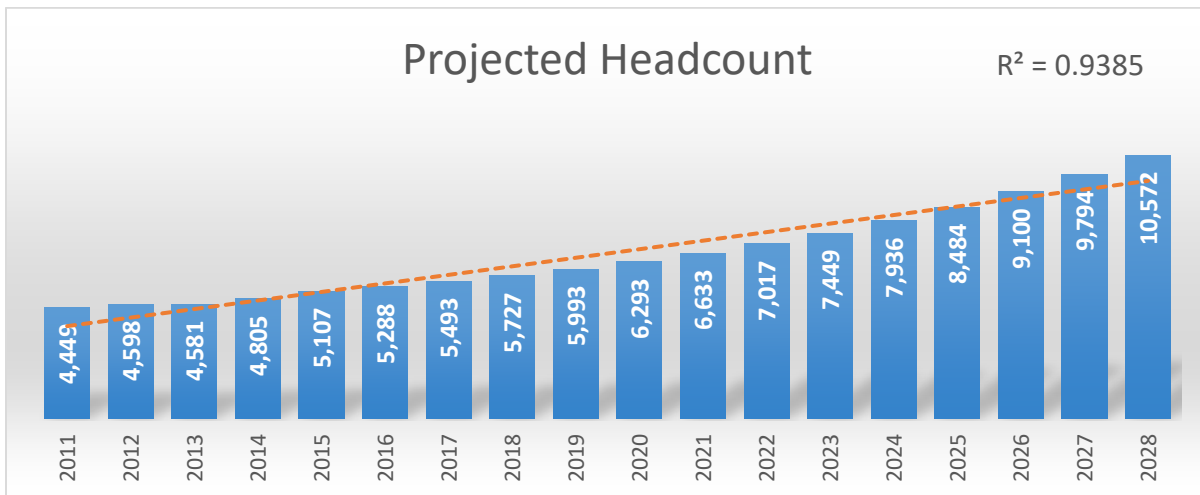
Snow College has six academic divisions representing the areas of Administration (College Survival, College Success, and Career Preparation courses), Business and Applied Technology, Fine Arts & Communication, Humanities (includes Foreign Languages), Natural Science & Mathematics, and Social Science.

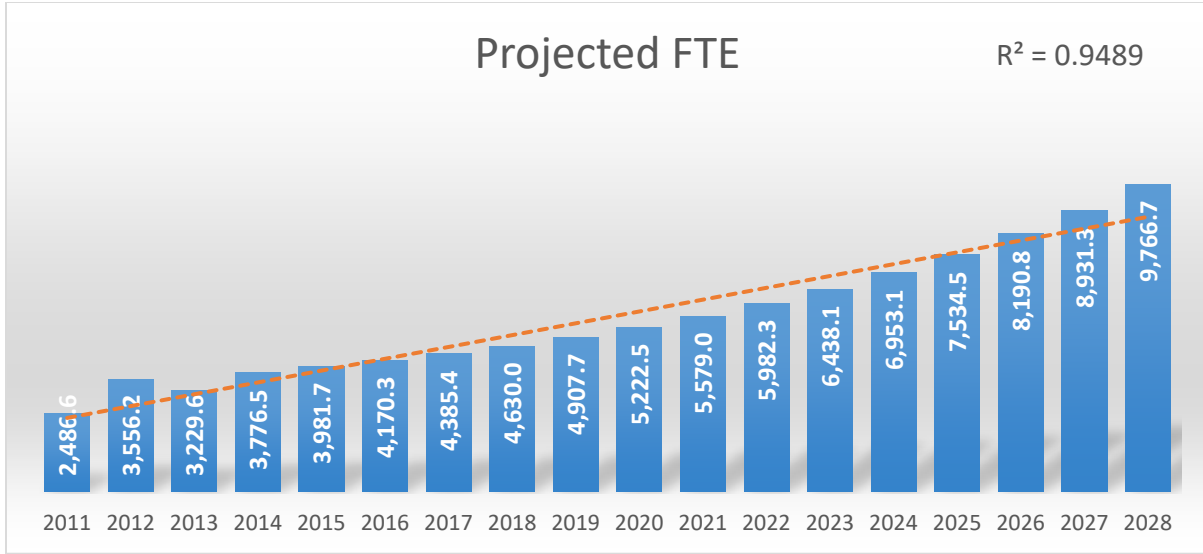


Snow College Enrollment Projections

Projected headcount and FTE is based off a growth formula using the following four main student categories: (1) high school students attending the college either on or off campus, (2) non-high school students from the six county area, (3) non-high school students from the Wasatch Front area, and (4) non-high school students from other areas in Utah, the United States and foreign countries. These projections are updated annually (April) and presented to the Utah State Board of Regents by the Snow College President.

Snow College intends to grow by at least 4% over the next 10 to 15 years. Given the institution’s current projection model, 28% of the enrollment growth comes from first-time freshmen students. To sustain the projected growth, the estimate for the fall 2018 freshman class is 1,844. Subsequent freshman classes would need to grow by at least 150 students each year.





OTHER ENVIRONMENTAL FACTORS

Basic Needs/Food Insecurity

While many students may still worry about gaining weight in college (the “freshmen-15”), a growing number are unable to buy nutritious food. This puts their physical health, mental health, and academic performance at risk. A study conducted at a mid-size university in Oregon found that 59% of students were food insecure at some point during the previous academic year.³⁹

In large part, rising tuition costs have forced some students make difficult choices regarding paying for classes, rent and food. More first-generation and low-income students are attending college, many of whom may lack the resources and the familial financial support to purchase nutritious food. The study also found that students with jobs are not immune. Nearly half the students in the study were working part-time while going to school (at least 18 hours a week) and were twice as likely to report experiencing food insecurity.⁴⁰

Despite the limited studies on college student food insecurity, existing research has found comparable results.⁴¹ Research at the City University of New York found 39% of students experienced food insecurity⁴² and 45% of students reported food uncertainty at the University of Hawaii, Manoa.⁴³

These studies note the connection between the lack of nutritious food and academic performance. According to the Oregon study, students with food insecurity were more likely to have a GPA less than 3.1

Student Mental Health

A mental health crisis faces today’s college campuses nation-wide. Evidence suggests that more and more college students are experiencing greater levels of stress and psychopathology than at any other time. According to the Association for University and College Counseling Center Directors, 95% of college counseling center directors reported an increase in the number of students with significant psychological issues and expressed growing concern that the number will continue to rise.⁴⁴

The American Freshman Survey (2014) found that the emotional health of incoming freshmen was at its lowest point in three decades with more than half the students reporting having experienced recurrent anxiety over the course of a year and 32% indicating episodes of debilitating depression.⁴⁵ However, very few (less than 15%) of these students went to counseling or sought help from other campus resources.

The Center for Collegiate Mental Health’s most recent report (2016)⁴⁶ found an increase in students seeking mental health services over the past six years. The study noted that college students are making counseling

³⁹ Prevalence and Correlates of Food Insecurity Among Students Attending a Midsize Rural University in Oregon. Patton-López, Megan M. et al. *Journal of Nutrition Education and Behavior*, Volume 46, Issue 3, 209 - 214

⁴⁰ Gutter, M., Copur, Z. Financial behaviors and financial well-being of college students: evidence from a national survey. *J Fam Econ Issues*. 2011;32:1–16.

⁴¹ Hughes, R., Serebryanikova, I., Donaldson, K., Leveritt, M. Student food insecurity: the skeleton in the university closet. *Nutr Diet*. 2011;68:27–32.

⁴² https://www.gc.cuny.edu/CUNY_GC/media/CUNY-Graduate-Center/PDF/Centers/Center%20for%20Human%20Environments/cunyfoodinsecurity.pdf

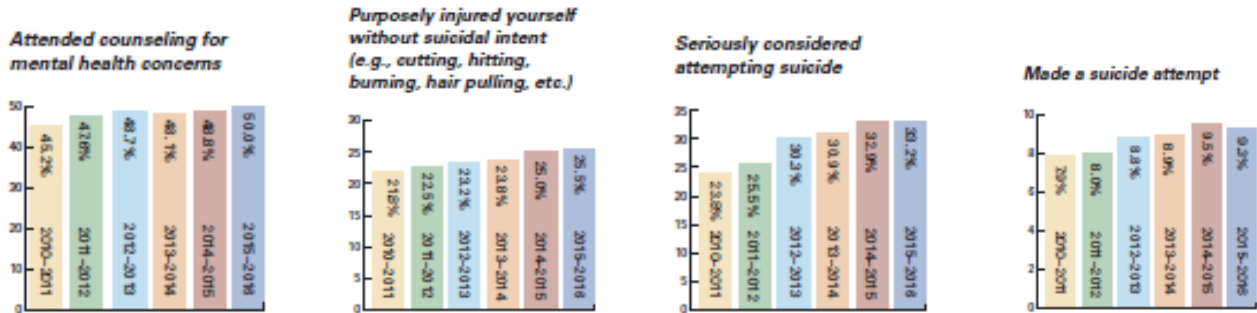
⁴³ http://scholarspace.manoa.hawaii.edu/bitstream/10125/20775/1/M.S.Q111.H3_4200%20AUG%202007_r.pdf

⁴⁴ <https://www.aucccd.org/assets/documents/aucccd%202016%20survey%20press%20release%20final.pdf>

⁴⁵ http://www.acha-ncha.org/docs/ACHA-NCHA-II_ReferenceGroup_ExecutiveSummary_Spring2013.pdf

⁴⁶ Source: Center for Collegiate Mental Health (2017, January). *2016 Annual Report* (Publication No. STA 17-74).

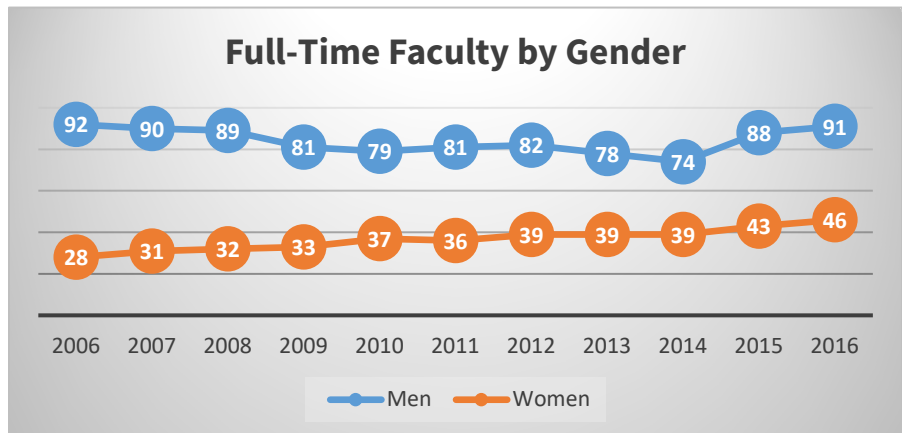
appointments at a rate seven times greater than institutional enrollment rates. In addition, the study found a steady increase in incidents of self-harm among college students. Among the students who sought counseling services, 33% of the students seriously considered suicide and 26% purposefully committed injury to self without suicidal intent.



Source: Center for Collegiate Mental Health (2017, January). 2016 Annual Report (Publication No. STA 17-74).

Faculty Gender and Ethnicity Profile

Snow College is a teaching institution which means our faculty are dedicated to teaching and student learning. Any faculty research or publication assignments are focused on best practices in pedagogy, textbook management, and classroom engagement. The institution does not use graduate or teaching assistants for instruction. Full-time faculty at Snow College typically



teach 15 credits per semester/30 credits per academic year. The following measure shows the distribution by ethnicity of full-time instructional faculty. The number of Hispanic instructional faculty increased from 2007 to 2011. All counts represent full-time faculty on the Ephraim and Richfield campuses.⁴⁷

Grand Totals	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Non-Resident, Alien	0	0	0	0	0	0	0	1	0	0	0
Hispanic/Latino	1	2	2	2	2	2	2	2	1	1	0
Asian	2	2	1	1	0	1	1	0	1	1	1
American Indian/Alaskan Native	1	1	1	0	0	0	0	0	0	0	0
Black or African American	0	0	0	1	1	1	1	1	0	0	0
Native Hawaiian/Pacific Islander	0	0	1	0	0	0	0	0	0	0	0
White	116	116	115	110	113	113	117	113	108	129	135
Two more races	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	1	0	0	0	0	0	3	0	1
Totals	120	121	121	114	116	117	121	117	113	131	137

⁴⁷ Source: AAUP Annual Survey and IPEDS Human Resources report component

APPENDIX

Report Card for Strategic Enrollment Management Assessment

		Average Score	Grade
Based on your knowledge and experience at Snow College, provide your response to the following enrollment and retention strategy components.		3.25	C
Mission and Goals	Snow College has achieved an institutional culture of partnership and collaboration from multiple departments, across campus in working toward enrollment goals.	3.18	C+
	Snow College has established clear and well-communicated enrollment and retention targets for goals in ENROLLMENT.	3.36	C+
	Snow College has established clear and well-communicated enrollment and retention targets for goals in DIVERSITY.	3.57	C+
	Snow College has established clear and well-communicated enrollment and retention targets for goals in RETENTION.	3.5	C+
	Snow College has established clear and well-communicated enrollment and retention targets for goals in COMPLETION.	3.04	C
	Snow College's enrollment and retention goals align with the college's mission, core themes, and objectives.	2.86	C-

		Average Score	Grade
Based on your knowledge and experience at Snow College, provide your response to the following enrollment and retention strategy components.		2.96	C-
Institutional Resources	Snow College has a data-rich environment which informs decisions and strategies for enrollment and retention goals.	3.04	C
	Snow College has developed an enrollment and retention infrastructure sufficient with SKILLED STAFF to achieve enrollment goals.	2.71	C-
	Snow College has developed an enrollment and retention infrastructure sufficient with POLICIES AND PROCEDURES to achieve enrollment goals.	3.0	C
	Snow College has developed an enrollment and retention infrastructure sufficient with DECISION-MAKING GROUPS to achieve enrollment goals.	3.21	C+
	Snow College has developed an enrollment and retention infrastructure sufficient with CLEAR ACCOUNTABILITY MEASURES to achieve enrollment goals.	3.50	C+
	Snow has implemented student friendly course scheduling practices and procedures that foster student progress and completion in support of the college's enrollment goals.	2.68	C-
	Snow has implemented student friendly course scheduling practices and procedures that foster student progress and completion in support of the college's retention goals.	2.93	C-

	Snow College has course scheduling practices that allow for support enrollment and retention goals.	2.86	C-
	Snow College has course scheduling practices that allow for support student growth.	2.57	D+
	Budget planning and allocations are in place to support the college's ENROLLMENT GOALS.	3.07	C
	Budget planning and allocations are in place to support the college's RETENTION GOALS.	3.07	C

		Average Score	Grade
Based on your knowledge and experience at Snow College, provide your response to the following enrollment and retention strategy components.		3.28	C
Processes	There are clear targets and transition strategies to move students through the enrollment cycle of admission, registration, retention, and completion.	3.07	C
	Each non-academic support program or department has articulated action steps for implementing college enrollment and retention goals.	3.46	C+
	Snow is achieving sustainable institutional enrollment and retention goals.	3.32	C+