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INTRODUCTION

Hillsborough Community College
Project Summary
INTRODUCTION
The following is a summary of all the components CLARUS Corporation has completed for Hillsborough Community College’s market analysis. It is comprised of the executive summaries of the individual reports for each component – the Student Experience, the High School Scan, the High School Counselor Scan, the Workforce Development Scan, the Community Scan, the Non-Returning Student Scan, and the Brand Platform. For more detailed information, please see the individual reports and their appendices.
THE STUDENT EXPERIENCE AT HILLSBOROUGH COMMUNITY COLLEGE

Hillsborough Community College
Project Summary
THE CUSTOMER EXPERIENCE

The customer experience is the sum of all experiences a potential student or student has with a community college, over the duration of their relationship with that college, from awareness, interest, inquiry, application, and enrollment to attendance and advocacy. But multiple definitions abound for the customer experience across industries and companies. A simplified definition for the customer experience at community colleges is:

“How potential and current students perceive their interactions with your college.”

So what is an “interaction?” It’s when your college and your potential and current students have a two-way exchange. When potential students navigate your website, call the contact center, send an email, go to a campus, talk to one of your employees, enroll at the college, attend classes – that’s when they’re making judgments about whether or not you meet their needs, are easy to do business with, and are enjoyable to do business with. That’s when they’re having an actual “customer experience” or “student experience.”

IMPORTANCE OF THE CUSTOMER EXPERIENCE

The real question is why should the customer experience be important to a community college? With the rapid growth and popularity of social media, specifically Facebook and Twitter, peer-to-peer reviews of experiences with a community college spread like wildfire – and negative reviews spread even faster. According to a report conducted by Harris Interactive (2010), combining increased customer expectations with the power of social media means it is even more critical today to ensure a good customer experience. And these results hold true for potential and current students at community colleges, possibly even more so with the advent of online media. A popular example of this is the website Rate A Professor where students rate their experiences with professors at a college; these ratings are consulted by many college students before enrolling in a class. The Harris Interactive Report indicated:

- Eighty-six percent of consumers quit doing business with a company when they have a bad customer experience. With community colleges only retaining half of their enrollees from Fall to Fall nationally, it is very important to understand how the students’ experiences with the college impact their willingness to stay, or even enroll in the first place.

- Eighty-two percent of consumers who had a bad experience told others about it. When asked why they chose to attend a community college, a majority of the potential and current students attribute it to “word of mouth,” or what they had been told by others. When a potential or current student has a negative experience, they are five times more likely to share the negative experience than a positive experience. Media, even with excellent placement, cannot combat a bad experience.
• In 2006, respondents reacted to bad customer experiences by swearing or shouting at employees, but by 2010 consumers are taking their anger and acting on it via word of mouth and social channels by posting a negative customer review on the company’s website, Facebook, or a blog. With the explosion of social media and the ease in sharing the outcome of a customer experience, the number of people who now know about a bad customer experience has exponentially grown. One post on a college’s Facebook page can inform hundreds or thousands of potential and current students about a bad experience—not the 15 or 20 people that the individual would have interacted with during a day or week a few years ago.

So why is the “customer experience” or “student experience” of potential and current students at a community college important? Bad experiences can be shared with many people in a matter of minutes through social media. Community colleges are also facing more competition for students from proprietary colleges and state colleges. In periods of high enrollment, community colleges, like other companies, do not have to ensure all potential and current students have a good experience—there is another potential student waiting in line to fill a seat in a class. But as the pool of potential students begins to decline, the initial student experience becomes even more important in maintaining enrollments. If the potential students or inquiries do not get the information they need about the programs and services at the college, and their phone calls and emails are never answered, they will never apply. If applicants do not get responses to questions and assistance during the enrollment process, they may not complete the applicant process and will never become students. And if enrolled students do not have a positive experience, they will not remain at the college and enrollments are impacted through decreased retention.

TRENDS IN CUSTOMER EXPERIENCE FOR 2012
Businesses and community colleges that provide an excellent customer experience will thrive, even in times of reduced market potential. But technology, mobile devices, and social media will continue to impact how potential and current students evaluate and communicate their experiences with a community college. It is important for community colleges to understand the trends that are being seen in the customer experience in 2012.

• Consumers prefer to resolve their customers service issues using the telephone (90 percent), face to face (75 percent), company website or email (67 percent), online chat (47 percent), text message (22 percent), and social networking site (22 percent). (Source: America Express 2011 Global Customer Service Barometer)

Maintaining the student experience has become even more complex today. With the explosion in mobile phones, the minute a potential or current student thinks of a question,
a call is made – day or night – where previously access to telephones was more limited (mobile phones were not predominant). Internet access on mobile phones has also increased the complexity of the student experience by providing the ability to contact a college instantly through email, online chat, or text messaging any time of the day or night. And today’s students expect an immediate response. Many community colleges’ contact centers and response systems are based on a working model of Monday to Friday, during business hours, not a 24/7 response. The issue for many community colleges is to determine the best channels for responding to potential and current students and to maintain the highest level of student service with those channels – rather than trying to maintain all channels and doing so poorly.

- Half of consumers give a brand only one week to respond to a question before they stop doing business with them. (Source: RightNow Customer Experience Impact Report 2011)

Response time to questions and issues has had a major impact on the customer experience with the usage of the internet and the 24/7 availability of contacts. Historically examining the evolution of customer contacts, prior to telephones and email, consumers had to actually visit a company or send a letter – taking weeks to get responses back and forth. Along with the increase in telephone usage came expectations that answers would be forthcoming quickly – if not during the call, within a day or two after – if the company could be reached and voicemail messages were returned in a timely manner. With email and the explosion of cell phones, there has become an expectation of an immediate response, especially with today’s availability of email on cell phones. Answers to potential and current students’ questions are expected within minutes, not hours, days, or weeks. Community colleges have to provide realistic turnaround times for responses, and if those responses are slow, or not forthcoming at all, the potential and current students will quickly look to competitors for answers.

- Forty percent of organizations cite “complexity” as the greatest barrier to improving multichannel customer experience, overtaking “organizational structure” since 2010. (Source: Econsultancy MultiChannel Customer Experience Report)

With the increase in the ways that potential and current students can contact a college, the complexity of maintaining multiple communication channels has also increased and this means the college has to have a systematic response system and the organizational structure to ensure that current and potential students are getting a consistent and excellent experience at all levels and locations of the college. While the complexity has increased,
the college still has to have an organizational structure that will provide consistent application of policies and procedures.

- Only 37 percent of brands received good or excellent customer experience index scores this year. Sixty-four percent of brands got a rating of “okay,” “poor,” or “very poor” from their customers. *(Source: Forrester’s Customer Experience Index, 2012)*

Nationally, all companies, not just educational institutions, are receiving lower scores on the customer experience. But as the potential student market contracts, and the competition for students increases, being able to differentiate itself for a great student experience will provide the competitive advantage for community colleges during a market contraction. And for colleges that promise potential and current students a great experience as part of their branding and communicate it through their advertising, but do not deliver, current and potential enrollments will be lost.

- Poor customer experiences result in an estimated $83 billion loss by US companies each year because of defections and abandoned purchases *(Source: Parature Customer Service Blog)* and 89 percent of consumers began doing business with a competitor following a poor customer experience. *(Source: RightNow Customer Experience Impact Report 2011)* The average annual value of each customer relationship lost to a competitor or abandoned is $289. *(Source: Genesys Report - The Cost of Poor Customer Service)*

The revenue loss from potential enrollees because of poor student experiences at a community college can be measured. When more than half of the applicants at a community college do not follow through and enroll, what is the lost revenue to the college? Assume that a student will enroll full-time for 12 credits for the Fall semester, and the tuition for that student is $1,500 for the semester. If a college has 10,000 applicants, and 5,000 do not enroll – a 50 percent conversion – the revenue that is lost on the 5,000 that did not enroll is $7,500,000 for a semester. While 100 percent enrollment of applicants is not a realistic goal, a 60 percent conversion of enrollees into applicants is realistic. So the college only converting 50 percent of applicants is still losing $1,500,000 for the semester (1,000 students x $1,500 revenue for the semester). And these numbers do not even consider the customer lifetime value, or the revenue that one student will bring to a college over their lifetime. If one student does not follow through and apply as in the example above, and that student goes to another college, all future revenue for that student is lost. For example, if the student was in a career field or an academic transfer program, and stayed at the college for two years, the value of the student to the college would have been $6,000 in revenue ($1,500 x 4 semesters). And if the student returned to the college
for continuing education over the next 10 to 20 years, the total customer value could be more than $10,000 per student – in tuition and fees alone. As more colleges struggle with reductions in state aid and reliance on tuition revenue becomes even more important, the student experience can be the one variable that the college can impact to balance the budget.

- Half of smartphone users would prefer to use a mobile customer service application to try to resolve their customer service issue before calling in to a contact center. *(Source: SpeechCycle and Echo Research Study)*

The importance of self-service and mobile applications will continue to grow as a component of the customer experience. More than half of the community college students have cell phones with internet capabilities and, for minorities and those in lower socio-economic groups, the increase in internet access through mobile devices has exploded. As community colleges evaluate their contact systems and the student experience, mobile applications allowing self-service have to be a key component of their strategy.

- Customer power has grown, as 73 percent of consumers trust recommendations from friends and family, while only 19 percent trust direct mail *(from Forrester report “Consumer ‘Ad-itudes’ Stay Strong”)*. *(Source: Forrester Research Blog)*

Word of mouth, or recommendations from family and friends, has always been a key reason that potential and current students choose to attend a community college. But when the student experience is poor for a potential or current student, they will not recommend the college to others in their circles of influence. And even worse, when the college provides a bad student experience to potential and current students, the effects are magnified. The worst scenario for a community college is to have a reputation of poor customer service in a community. This will prevent potential students from even looking at the college when considering educational options.

- Only 26 percent of companies have a well-developed strategy in place for improving customer experience. *(Source: Econsultancy MultiChannel Customer Experience Report)*

There is always room for improvements in the student experience, but first a community college has to have a better understanding of the current student experience. Generally, community colleges relay anecdotes about “good” and “bad” student experiences. And if the bad experiences outweigh the good, then the college may put an emphasis on improving the student experience. Improving the student experience starts with measuring
it, and the right measures will: identify problem areas in the experience, allow for tracking improvements over time, and provide a meaningful experience to the potential or current student. Generally, when examining a student experience, mystery or secret shoppers are utilized, because it answers crucial questions about the student’s experience. If a community college only uses internal staff to “evaluate” a student experience, the experience is generally seen from the eyes of those who created the systems, know the systems, and understand the systems, and not from those who actually have to use the systems. Providing an objective examination of the student experience, especially the processes and procedures, allows a community college to develop a plan for improvement and to bring the best talent in the organization to enhancing the student experience.

The community colleges that provide excellent student experiences will continue to thrive and grow even in turbulent enrollment periods. But the colleges have to understand their current levels of student experiences and develop a plan to make improvements in the student experience at their college.

STANDARDS FOR A GREAT CUSTOMER EXPERIENCE

Only your potential and current students can tell you whether they found their experience useful, usable, and enjoyable – a good experience – or whether it was not. And that is totally a function of their perceptions. So what makes a great customer experience? This is a difficult question to answer because it will vary for different companies and industries, but there are four standards that have to be included to provide a good customer experience: (1) availability of contact channels, (2) timeliness of responses, (3) accuracy of responses, and (4) attitude of staff.

First, the potential and current students expect to be able to interact via several channels and at their convenience to have any issues resolved – they expect to have available to them multiple channels to contact allowing them to interact with the college in the way most convenient for them. Most prefer speaking to a live person (staff member), using live chat, or sending an email. But if staff is always unavailable, and voicemail is the norm, the channel is not really available to the potential or current students. If live chat is an option on a college’s website, but only staffed for a few hours a day, the channel is really not available to the potential and current students. Availability is not only having the channels for the potential and current students to contact the college, but also having the staffing to make the channels available at times convenient for the majority.

The second standard for a good customer experience is the timeliness of the response after making contact with a company through a preferred channel. Potential and current students want to be able to make quick, informed decisions and expect to speak with knowledgeable and responsive
staff whether at the college, online, or on the phone. The easiest way to provide a poor student experience to a potential or current student is not providing an answer to a question at all, necessitating additional contacts by the potential or current students. Or to assure a potential or current student that an answer will be received quickly, and it is not – it may be a week later. Many potential students will simply choose another college to work with if answers are not received in a timely manner.

Accuracy of a response is the third standard for a good customer experience. Receiving an answer quickly is important, but when potential or current students do not receive a satisfactory answer to their question, they will make additional contacts. For example, if potential students call the college with a question about applying and do not receive a satisfactory answer – one that allows the students to proceed to the next step in the application process – they will call back. And they will most likely call back within minutes to get another person to speak with – increasing the call volume to the college. But if staff deals with questions properly the first time, potential and current students will have had a good experience, and the college will save money and staff time as the call volumes are reduced. Nothing will impact the student experience more than being provided an incorrect answer – one that is acted on by the potential or current student, who is later told it was the wrong action.

The final standard for a good customer experience is the attitude of staff who respond to current and potential customers. National studies of potential students indicate that they look for three things when choosing a college: whether the college has their program area of interest, availability of scholarships and financial aid, and staff willingness to provide information and assistance. Friendly and courteous staff, those who are willing to stop and take the extra few minutes to assist a student and make sure that student understands what they need to do, make a major difference to potential students when choosing a college to attend. The staff member can actually make the difference in that student’s choice of a college to attend. But if interactions with staff are rushed, or if staff is short or brusque with a student, or just downright rude to potential and current students, they will not have a good student experience. In fact, they may choose another college to attend simply because of the interactions.

A good “customer experience” or “student experience” is a result of having multiple contact channels available for potential and current students to access, responding in a timely manner, providing accurate responses, and having staff that are willing to go the extra mile to provide service. But for this to happen, a college has to have an organizational structure that will allow staff the time and ability to respond well, and the commitment to reward staff who go the extra mile and work with those who will not.
THE STUDENT EXPERIENCE AT HCC

A key factor in whether a potential student actually applies and eventually enrolls at Hillsborough Community College is their perception of the “customer experience,” or the “student experience” at the College as we will refer to it in this report. The student experience is how potential students perceive their interactions with Hillsborough Community College. While there is generally always room for improvements in the student experience, first Hillsborough Community College needs to have a better understanding of the “real” or current student experience – from the viewpoint of the potential student and not the College. During interviews at Hillsborough Community College, staff relayed many anecdotes about “good” and “bad” student experiences. But the issue is determining whether the “bad” experiences were isolated instances, or a result of systems issues causing a “bad” result time and again for potential students. And if the bad experiences really are due to system issues, then the College has to examine their processes and procedures to determine how to improve the student experience. But improving the student experience starts with measuring it, and the right measures will: identify problem areas in the student experience, allow for tracking improvements over time, and provide a meaningful experience to the potential or current student.

Only the potential and current students can tell the College whether they found their experience useful, usable, and enjoyable – a good experience – or whether it was not. Mystery (or secret) shoppers were utilized to explore the student experience of potential students because they answer crucial questions about the student’s experience from an inquiry and applicant viewpoint. When a community college only uses internal staff to “evaluate” a student experience or even map the processes, the experience is generally seen from the eyes of those who created the systems, know the systems, and understand the systems, and not from those who actually have to use the systems. Surveys of current students and surveys of applicants who did not follow through and enroll at Hillsborough Community College were also utilized to assess the student experience at the College. By providing an objective examination of the student experience, especially the processes and procedures, Hillsborough Community College can develop a plan for improvement and use the best talent in the organization to enhance the student experience. In each component of the evaluation of the student experience, the four standards of a student experience were measured: (1) availability of contact channels, (2) timeliness of responses, (3) accuracy of responses, and (4) attitude of staff. The evaluation of the student experience at Hillsborough Community College was conducted from May 2012 to August 2012 and a summary of the activities and the findings are presented in the following sections.
INQUIRY SCAN

Providing an objective examination of the student experience, especially evaluating the College’s processes and procedures for application and enrollment, will allow Hillsborough Community College to develop a plan for improvement and to utilize the best talent at the College to enhance the student experience. The College was contacted by inquiries matching the profiles for the potential students at the College. The goals for the Inquiry Scan for Hillsborough Community College included:

- To understand exactly what the student experience for potential students is at Hillsborough Community College by phone and web
- To discover if the potential students are receiving a consistent and superior student experience during the inquiry phase through all the contact channels
- To identify gaps in the student experience to improve it for the potential students

In summary, 23 inquiry contacts were made by personnel at CLARUS Corporation over one month. Eight of the contacts resulted in a response to the inquiry (35 percent) and 15 of the contacts did not result in a response to the inquiry (65 percent). Regarding HCC Live, 10 contacts were made and three resulted in a response to the inquiry (30 percent). On each ticket submission to HCC Live, confirmations of the tickets being submitted were received but none were actually answered. For the contacts attempted directly with campus personnel, 13 contacts were initiated and five responses were received (38 percent), but a majority of the phone messages left for campus personnel never received a response.

So how did the College rate on the standards for providing a good student experience? A summary of the ratings for the College based on the Inquiry Scan include:

1. **Availability Of Contact Channels: Good**

   The College has multiple channels available for inquiries to contact the College through HCC Live and direct college channels. Through HCC Live, the inquiries can call, chat online, request a call back, and submit a ticket with a question. Using the campus directories on the College’s website, the inquiries can call, send an email, refer to FAQs, and visit the campus. The only issue with availability that was noted was that the College is not available 24/7, but the majority of the channels are primarily open during regular working hours Monday to Friday. There are fewer contact options available in the evenings and on the weekend.
2. **Timeliness Of Responses: Poor**

The major issue for Hillsborough Community College is not the length of time for the response but the **lack of a response at all**. Regardless of the contact method – phone messages, tickets, emails, or call backs – the majority of the contacts never received a response. Overall only 35 percent of the contacts, regardless of the channel used, resulted in any response – timeliness was not even an issue. For the inquiries that did receive responses, if the question was not answered immediately, it may have been several days before a response was received.

3. **Accuracy Of Responses: Fair**

For the 35 percent of the inquiries that were responded to by Hillsborough Community College, very little information was provided in any of the responses other than in the phone calls. But even in some of the phone calls and the other responses, prospective students were referred to other resources to obtain answers. For a majority of the contacts, the prospective students would have to make another contact to get an answer to their inquiry – they did not get a complete answer during the contacts. The difficulty in evaluating the accuracy of the responses is that there were few responses to the requests for information by the prospective students.

4. **Attitude Of Staff: Good**

Staff interactions occurred with personnel at HCC Live as well as campus personnel. Overall, the majority of the personnel were friendly, courteous, and really tried to assist the prospective students. Staff should be congratulated on their interactions with prospective students.

**APPLICANT SCAN**

The purpose of the Applicant Scan was to examine the admission process at Hillsborough Community College from a prospective credit student’s “first impression” of the College’s admission process and to examine how a prospective student is handled when applying to the College using secret shoppers. The goal of this project was to examine the processes and procedures that prospective credit students have to experience to determine if there are any barriers – perceived or real. The specific research objectives for this project were to:

- Pinpoint areas in the application, registration, and payment processes which may cause students issues or concerns in the process, or present barriers to completing the admission and enrollment process for credit students
- Provide recommendations for improvements in the systems and processes, if needed
Two credit applicant profiles, a recent high school graduate and an older adult with a college degree, were presented to Hillsborough Community College for moving through the admission process. The College gave approval for the profiles to begin the application process on June 15, 2012. Since the application process is not centralized at Hillsborough Community College and each campus handles their own applicants, a decision was made to have each of the two profiles apply to each of the five campuses. The rationale for using the same profiles for application to each of the campuses was to ensure that the same processes would be followed by the applicant so that the campus processes would be comparable for tracking the progress of the applicants. The ultimate goal was for the profiles to complete the admission process at each campus and actually pay for classes prior to August 9, 2012, the day prior to the final payment date for the Fall 2012 semester at Hillsborough Community College.

The applications (for the two credit profiles) were submitted to each campus of Hillsborough Community College between June 20 and July 7, 2012. The applicant process for each profile for each campus was documented through August 31, 2012. The major issue uncovered during the application process was that the letter with the student ID, which was to be sent to the applicants’ home address immediately after submission of the application, was only received by two of the recent high school graduate profiles and by only two of the working adult profiles. Six of the profiles never received any communication from the College about the student ID, nor did they receive any follow-up communication unless it was a response to something initiated by the applicant. Without the student ID, the applicants are effectively stopped from moving forward with the applicant process.

The outcomes for the applications submitted for each of the credit profiles is presented in the following by campus:

- **Brandon Campus**
  - Recent High School Graduate
    - No letter received with student ID and no communication to date
  - Working Adult With College Degree
    - Letter received with student ID, completed application process through transcript submission (would have completed process but duplicate transcript noted by College personnel)

- **Dale Mabry Campus**
  - Recent High School Graduate
    - No letter received with student ID, but high school transcript was faxed to the number provided by HCC Live, no communication to date
  - Working Adult With College Degree
- No letter received with student ID, but received ID in an email from HCC Live, completed online orientation, told to come to campus to see advisor but could not

- Plant City Campus
  - Recent High School Graduate
    - Letter received with student ID, high school transcript sent, no information from College about receipt, no communication to date
  - Working Adult With College Degree
    - Letter received with student ID, completed the application process and registered for classes, did not pay

- SouthShore Campus
  - Recent High School Graduate
    - No letter received with student ID, high school transcripts were mailed, but no communication to date
  - Working Adult With College Degree
    - No letter received with student ID, but student ID listed in an HCC Live communication, so completed online orientation and submitted transcripts (would have completed process but duplicate transcript noted by College personnel)

- Ybor City Campus
  - Recent High School Graduate
    - Letter received with student ID, had hold for orientation, applicant found online orientation link, completed it without permission and received certificate, but hold was not lifted, and no communication to date
  - Working Adult With College Degree
    - No letter received with student ID, ID requested and sent in an email, completed orientation, but could not register due to an incorrect major code which could only be changed by going to campus
So how did the College rate on the standards for providing a good student experience based on the applicants’ experiences during the enrollment process? A summary of the student experience at the College for the Applicant Scan include:

1. **Availability Of Contact Channels:** **Good**

   As seen in the Inquiry Scan, the College has multiple channels available for inquiries to contact the College through HCC Live and direct college channels – phone, live chat, request a call back, submit an online ticket with a question, email, phone, and visiting the campuses. Again, the College has the channels available for the applicants to contact the College.

2. **Timeliness Of Responses:** **Poor**

   Hillsborough Community College continues to get a poor rating on the timeliness of responses to contacts. For the questions that HCC Live could respond to, responses were generally received timely – if not at the point of the contact. But if the responses required the College to respond, for example to a ticket, then the responses may never occur or were very slow in response – potentially days. For the contacts directly with the campuses, the voicemail messages were less likely to be responded to (at all) than the email messages. The email messages, while least used, received the more timely responses than other contacts and were most likely to actually be responded to by campus personnel.

3. **Accuracy Of Responses:** **Fair to Good**

   When the applicants were in direct contact with campus personnel, they were more likely to receive correct responses to questions being asked – if they could get in contact with College personnel. There were a few instances when the information provided to an applicant profile from one campus actually contradicted the information provided to the same applicant profile by another campus. It appears that the processes are not actually identical for each campus and that one campus may allow applicants to do things differently from other campuses. There was also some discrepancy between the information HCC Live was providing to an applicant profile and the information the campus was providing to the same applicant profile about how to receive a student ID. There needs to be consistency across all contact channels for information.

4. **Attitude Of Staff:** **Good**

   The majority of the staff interactions – whether personnel at HCC Live or those on the campuses – were pleasant and helpful. The majority of the personnel were friendly,
courteous, and really tried to assist the prospective students. But some of the email responses from campus personnel – the tone and information – were not as friendly and complete as one would expect from the College.

NON-ENROLLING APPLICANT SCAN
A major measure of marketing and recruitment success is the number of applicants a college receives, and then the conversion of those applicants into currently enrolled students at the college. For a college to continue to experience enrollment success, it not only has to generate increasing numbers of applicants, but it has to convert the applicants into enrolled students. The student experience provided by the college during the application and enrollment process is a key in maintaining a high conversion rate of applicants into enrollees. Hillsborough Community College was interested in evaluating the student experience for the potential students as they proceed through the application and enrollment processes at the College, due to a continuing decline in the conversion rate of applicants to enrollees.

Applicant Conversion. The chart above presents the number of total applicants from Fall 2007 to Fall 2011 at Hillsborough Community College and the conversion of those applicants into enrollees. In Fall 2007, Hillsborough Community College had 8,797 total applicants, of which the
College converted 62.3 percent into enrollees. During Fall 2007, the College had an application fee – each applicant had to pay a fee to apply to the College. In Fall 2008, the total number of applicants to the College increased to 12,339 applicants, an increase of 40.3 percent in total applications in one year. It should be noted that in Fall 2008, the College also removed the application fee, and that was the time frame in which the applicant pool also increased due to the increase in high school graduates and the economy beginning to slow and unemployment beginning to increase in the market. In Fall 2008, the College only converted 46.8 percent of the total applications to the College. It should also be noted that staffing patterns at the College – staff available to assist students – did not change, although the number of applicants increased dramatically at the campuses.

Total applicants increased to 14,143 in Fall 2009, and the College only converted 42.7 percent of the applicants (as seen in the chart above). The decline in conversion rates continued into Fall 2010. Hillsborough Community College had 13,250 applicants for Fall 2010 and only converted 40.5 percent. By Fall 2011, the total number of applicants to the College reached a high for the five-year period, with 14,724 applicants, and the conversion rate had increased to 42.5 percent. Over the past five years, Hillsborough Community College has seen total applications to the college increase 67.4 percent while the conversion rate has slipped to 40 percent from the community college standard of 60 percent.
At Hillsborough Community College, applications are processed at each campus. The potential students indicate on the application which campus they are interested in attending and the applications are processed by that campus. The chart on the previous page presents the total applicants for each campus from Fall 2007 to Fall 2011, and the increases are fairly consistent across the campuses. At the Brandon Campus, applicants increased 39 percent from Fall 2007 to Fall 2011, from 2,395 applicants to 3,337 total applicants. The Dale Mabry Campus experienced a 63 percent increase in total applicants over the last five years, from 4,380 applicants to 7,136 applicants from Fall 2007 to Fall 2011. Plant City also experienced a major increase in applicants from Fall 2007 to Fall 2011; applicants increased 68 percent, from 864 applicants to 1,452 applicants. The applicants to the Ybor City Campus almost doubled in the last five years – applicants increased 96 percent from 1,036 applicants to 2,026 applicants. And the SouthShore Campus, as would be expected, saw a major increase in applicants over the last five years due to the campus being in its start-up phase. Total applicants to the SouthShore Campus increased 1500 percent – from 47 applicants to 754 applicants.

The applicant conversion for each campus over the last five years is shown in the chart above, and the conversion rates are comparable across the campuses with minor variations from year to year. In Fall 2011, the applicant conversion rate for the campuses ranged from a high of 47.6 percent to
a low of 34.2 percent (Brandon 47.6 percent; Dale Mabry 40.5 percent; Plant City 41.7 percent; SouthShore 42.2 percent; Ybor City 34.2 percent).

**Research Objectives.** The goal of the Non-Enrolling Applicant Scan is to identify the touch points in the enrollment process for Hillsborough Community College and to identify why applicants may be lost at those touch points. The specific research objectives for the Scan include:

- To compare the profiles of the applicants who enroll at Hillsborough Community College and those who do not follow through and enroll at the College
- To understand the reasons that the applicants who do not follow through and enroll chose to apply to the College and the other choices they had for educational attainment at the time of the application
- To evaluate the level of communication from the College with the non-enrolling applicants during the application process and whether improvements are needed during that process
- To document the experiences of the non-enrolling applicants as they moved through the application process and determine if there were ways that the College could have proactively worked with the applicants to move them through the key touch points in the process
- To determine when the non-enrolling applicants drop out of the application process and to understand the reasons they do not follow through and complete the process
- To document the reasons that the non-enrolling applicants did not enroll at Hillsborough Community College, what the applicants did do, and whether they would consider attending in the future

A telephone survey was conducted in order to better understand why the non-enrolling applicants for Fall 2011 under 45 years of age (comprising the majority of the non-enrolling applicants) are not following through and enrolling at Hillsborough Community College. Three hundred fifty focused in-depth interviews were conducted by telephone from May 14 to June 5, 2012 with the non-enrolling applicants in the targeted age groups.

**Non-Enrolling Applicant Scan Results.** The chart on the following page summarizes the percentage of the non-enrolling applicants that completed each function, emphasizing the areas where the applicants were lost in the process.
### Non-Enrolling Applicant Results At HCC, Fall 2011

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application For Fall 2011</td>
<td>100</td>
</tr>
<tr>
<td>HCC First Choice</td>
<td>80</td>
</tr>
<tr>
<td>Applied To Other Colleges</td>
<td>75</td>
</tr>
<tr>
<td>Attendance At HCC Encouraged</td>
<td>70</td>
</tr>
<tr>
<td>Used HCC Website During Info Search</td>
<td>60</td>
</tr>
<tr>
<td>Info On Website Easy To Find</td>
<td>55</td>
</tr>
<tr>
<td>Applied Online</td>
<td>50</td>
</tr>
<tr>
<td>Difficulty Submitting Application</td>
<td>45</td>
</tr>
<tr>
<td>Correspondence Received After Application</td>
<td>40</td>
</tr>
<tr>
<td>Acceptance Letter</td>
<td>35</td>
</tr>
<tr>
<td>Emails</td>
<td>30</td>
</tr>
<tr>
<td>Letter</td>
<td>25</td>
</tr>
<tr>
<td>Info Received Once</td>
<td>20</td>
</tr>
<tr>
<td>Info Received Couple Times</td>
<td>15</td>
</tr>
<tr>
<td>Correspondence Sufficient</td>
<td>10</td>
</tr>
<tr>
<td>Called HCC During Application Process</td>
<td>5</td>
</tr>
<tr>
<td>Information Sought During Call Received</td>
<td>0</td>
</tr>
<tr>
<td>Lack Of Info During Call Required Visit</td>
<td>0</td>
</tr>
<tr>
<td>Visited Location Of HCC</td>
<td>0</td>
</tr>
<tr>
<td>Emailed HCC During Application Process</td>
<td>0</td>
</tr>
<tr>
<td>Email Response Received</td>
<td>0</td>
</tr>
<tr>
<td>Info Sought Was Received</td>
<td>0</td>
</tr>
<tr>
<td>Applied For Financial Aid</td>
<td>0</td>
</tr>
<tr>
<td>Received Financial Aid</td>
<td>0</td>
</tr>
<tr>
<td>Pell</td>
<td>0</td>
</tr>
<tr>
<td>Loan</td>
<td>0</td>
</tr>
<tr>
<td>Met With Academic Advisor</td>
<td>0</td>
</tr>
<tr>
<td>Submitted ACT/ SAT Scores</td>
<td>0</td>
</tr>
<tr>
<td>Placement Test Taken</td>
<td>0</td>
</tr>
<tr>
<td>Scores Indicated Remedial Courses</td>
<td>0</td>
</tr>
<tr>
<td>Participated In Orientation</td>
<td>0</td>
</tr>
<tr>
<td>Orientation Extremely/ Useful</td>
<td>0</td>
</tr>
<tr>
<td>Registered For Classes At HCC</td>
<td>0</td>
</tr>
<tr>
<td>Suggestion To Improve Application Process</td>
<td>0</td>
</tr>
<tr>
<td>Attended Another College</td>
<td>0</td>
</tr>
<tr>
<td>Did Not Enroll In Any College</td>
<td>0</td>
</tr>
<tr>
<td>Plan On Attending College In Future</td>
<td>0</td>
</tr>
<tr>
<td>Consider Attending HCC</td>
<td>0</td>
</tr>
</tbody>
</table>

Note: The diagram represents the percentage of non-enrolling applicants for each category.
Overall, 76 percent of the applicants that did not complete the enrollment process at Hillsborough Community College noted that Hillsborough Community College was their first choice college. Only 27 percent of the non-enrolling applicants actually applied to another college – four-year and two-year colleges in the area – when they applied to Hillsborough Community College, specifically University of South Florida, St. Petersburg College, Florida Atlantic University, Everest University, the University of Central Florida, Florida State University, the University of Tampa, and Valencia College. In other words, Hillsborough Community College was the only option considered by 73 percent of the applicants at the time they applied to HCC.

Overall, the educational goal for 57 percent of the non-enrolling applicants at the time of their application was to seek a degree (primarily an associate degree) when they applied to Hillsborough Community College, seven percent were interested in training for a job or to upgrade job skills, 25 percent wanted to transfer to another college, and 10 percent listed other goals. Thirty-two percent of the non-enrolling applicants had someone encourage them to attend Hillsborough Community College – mainly family and friends who said it was a good college, was cheaper, close to home, and they had gone there. Only five percent of the non-enrolling applicants had someone discourage them from attending HCC, again family and friends, who noted HCC was disorganized and not helpful, and to not attend a community college but just go straight to a four-year.

The website is the most important marketing tool for the College – 88 percent of the non-enrolling applicants used the College’s website to gain information during the enrollment process. Eighty-seven percent of the non-enrolling applicants noted that the information on the website they were looking for was easy to find, but a few of the respondents noted the website was confusing and hard to navigate. The majority of the non-enrolling applicants also applied online – 88 percent. Only six percent of the non-enrolling applicants noted they had any difficulty submitting the application and the issues most noted were residency problems and issues with financial aid.

Only 59 percent of the applicants actually received any correspondence from Hillsborough Community College after submitting their applications – 41 percent did not receive any communication from the College after submitting the application and a few of the respondents to the survey were still waiting (nine months later) for communication from the College telling them they were accepted. For those applicants that did receive communication from the College, slightly more than half (51 percent) only received one item and one-fourth got information a couple of times – 36 percent an acceptance letter, 34 percent emails, and 47 percent a letter. However sparse the communication, 82 percent of the non-enrolling applicants noted it was sufficient.
The first major drop in applicants in the enrollment process was after the submission of the application – with no communication from Hillsborough Community College, more than 40 percent of the applicants could not complete the process without their student ID, and many of today’s applicants are not aggressive in their push to gain information. For the applicants who did persist in the process, 36 percent had to call Hillsborough Community College for information during the application process. While half received the information they needed during the call about transcripts, financial aid, residency, and acceptance, the other half ended up having to visit the College to get the information needed. Only half of those applicants got the information needed – others faced long lines, were told to come back another day, and had poor interactions with advisors.

Only nine percent of the non-enrolling applicants actually emailed the College for information, but it was the most successful method utilized – 64 percent got a response to their email request and, of those, 76 percent got the information they needed.

There is a direct correlation to applying for financial aid and completing the enrollment process, especially if the applicant receives financial aid. Only 45 percent of the non-enrolling applicants actually applied for financial aid, and only 17 percent received any financial aid – primarily Pell grants (67 percent), and a few with loans (28 percent). If the applicants did not apply for financial aid, they were not likely to complete any of the other steps in the enrollment process – after this the number of applicants completing steps in the enrollment process diminishes.

Twenty-three percent of the applicants submitted ACT/ SAT scores and 19 percent took a placement test (the majority of which had scores that indicated placement in remedial classes was needed). Only 24 percent of the applicants met with an academic advisor. And even fewer, 21 percent, of the applicants participated in an orientation, but 85 percent of those who did noted the orientation was extremely useful or useful to them. Only 15 percent of the non-enrolling applicants actually registered for classes at Hillsborough Community College but did not complete the registration process because the majority simply could not pay for classes or had personal issues arise.

The primary outcome for a non-enrolling applicant at Hillsborough Community College in Fall 2011 was not enrolling at any college – 66 percent of the non-enrolling applicants did not enroll at any other college, and this correlates with the percentage that noted HCC was their first and only choice for a college to attend. The primary reason for not enrolling at HCC was financial – no money and had to work – while others noted classes were full, got the runaround, changed their mind or moved. The good news for Hillsborough Community College is that 94 percent of these applicants plan on attending college in the future, and 82 percent will most likely consider HCC.
Thirty-four percent of the non-enrolling applicants did enroll at another college, primarily the University of South Florida, St. Petersburg College, Pasco-Hernando Community College, Valencia College, Edison State College, and Miami Dade College.

Thirty-seven percent of the non-enrolling applicants did have suggestions for Hillsborough Community College to improve the enrollment process: get rid of the long lines, better and more communication, call applicants back to answer questions, provide financial aid help, answer the phone, provide correct information, stop the runaround, improve the website, more staff, more help, and less wait times for assistance.

So how did the College rate on the standards for providing a good student experience based on the non-enrolling applicants’ experiences during the enrollment process? A summary of the student experience at the College found in the Non-Enrolling Applicant Scan include:

1. **Availability Of Contact Channels: Good**
   
   As seen in the other scans, the College has multiple channels available for inquiries to contact the College through HCC Live and direct College channels – phone, live chat, request a call back, submit an online ticket with a question, email, phone, and visiting the campuses. Again, the College has the channels available for the applicants to contact the College.

2. **Timeliness Of Responses: Poor**
   
   Hillsborough Community College continues to get a poor rating on the timeliness of responses to contacts. For the questions that HCC Live could respond to, responses were generally received timely – if not at the point of the contact. But if the responses required the College to respond, for example to a ticket, then the responses may never occur or were very slow in response – potentially days. For the contacts directly with the campuses, the voicemail messages were less likely to be responded to (at all) than the email messages. The email messages, while least used, received the more timely responses than other contacts and are most likely to actually be responded to by campus personnel.

3. **Accuracy Of Responses: Fair to Good**
   
   When the applicants were in direct contact with campus personnel, they were more likely to receive correct responses to questions being asked – if they could get in contact with College personnel. There were a few instances when the information provided to an applicant profile from one campus actually contradicted the information provided to the same applicant profile by another campus. It appears that the processes are not actually
identical for each campus and that one campus may allow applicants to do things differently from other campuses. There was also some discrepancy between the information HCC Live was providing to an applicant profile and the information the campus was providing to the same applicant profile about how to receive a student ID. There needs to be consistency across all contact channels for information.

4. **Attitude Of Staff: Good**

The majority of the staff interactions – whether personnel at HCC Live or those on the campuses – were pleasant and helpful. The majority of the personnel were friendly, courteous, and really tried to assist the prospective students. But some of the email responses from campus personnel – the tone and information – were not as friendly and complete as one would expect from the College.

**STUDENT SCAN**

During the recruitment process, Hillsborough Community College has spent a great deal of time, effort, and money in communicating an image of the College to prospective students. There must be a match between the students’ expectations that have been created and the reality of the College to ensure a good student experience. The Student Scan measures whether the students’ expectations are being met at Hillsborough Community College and pinpoints specific areas that the College needs to work on to improve the student experience. The Student Scan has an exceptionally high reliability on the item areas which it examines for student ratings.

The customer service audit, the Student Scan, was administered online for Hillsborough Community College from April 19 to May 19, 2012. One thousand four hundred sixty-nine questionnaires were completed by current students. The ratings of the Hillsborough Community College students were averaged and statistically compared to the ratings of the community college students at the other 47 community colleges in the normative sample, comparing the ratings of the students at Hillsborough Community College with 21,631 other community college students, resulting in a 95 percent reliability and a ± 0.7 percent margin of error.

**Areas Of Excellence.** The areas in which the students at Hillsborough Community College rated as significantly higher than the community college students at the other 47 community colleges in the sample indicate that Hillsborough Community College is doing an excellent job – better that the other community colleges in the sample. Overall, the friendliness and courtesy of staff and the convenience of hours open were the two areas that were consistently rated higher by HCC’s students than the students at the other community colleges in the sample. The students at Hillsborough Community College provided excellent ratings to the friendliness and courtesy of staff and the convenience of hours open for the following departments at the College:
Areas For Improvement. The areas at Hillsborough Community College in which the students rated their experience statistically lower than the community college students at the other community colleges are considered areas that the College should consider for improvements. Overall, components of the enrollment process received the lowest ratings by the students and the major area of concern was the response time to questions/concerns across several areas – the Admissions Office, the Financial Aid Office, and the Information Center/Call Center. Availability of information before enrolling from the Admissions Office and the Financial Aid Office was also an area noted for improvement by the students. The ease in getting a transcript was rated lower by the students at Hillsborough Community College than the students at the other community colleges in the sample. With respect to the Financial Aid Office, students provided low ratings to the timing of financial aid awards. The students at Hillsborough Community College also expressed concern about the accuracy of the information received from the Information Center/Call Center by providing ratings lower than the students at the other community colleges in the normative sample. The students at the College also lower ratings to the ease of reaching requested campus offices and requested campus staff members than the community college students at the other colleges in the sample. And finally, the availability of college information systems on weekends and evenings was rated significantly lower by the students at Hillsborough Community College than the students at the other colleges.

After the current students at Hillsborough Community College defined the areas of excellence and the areas for improvement, ratings are given to the College as to how well it provided a good student experience. Based on the Student Scan ratings, the following ratings are given to Hillsborough Community College on the standards of a good student experience:

1. Availability Of Contact Channels: Good

   Hillsborough Community College students rated the College’s hours of convenience significantly higher than the other community college students rated their colleges in the
Student Scan – areas of excellence. However, an area that was rated as significantly lower by the Hillsborough Community College students was the ease of reaching requested campus offices and requested campus staff members. This may indicate that while the channels may be available, the students are not reaching staff needed by using the current contact channels.

2. **Timeliness Of Responses: Poor**

   Overall, the response time to questions and concerns was an area which received a rating statistically lower by the Hillsborough Community College students than the students at the other community colleges, especially the Admissions Office, the Financial Aid Office, and the Information Center/ Call Center. In every test, Hillsborough Community College continues to get a poor rating on the timeliness of responses to contacts.

3. **Accuracy Of Responses: Fair to Good**

   Even the current students at Hillsborough Community College expressed concern about the accuracy of information being received. The students at Hillsborough Community College rated the accuracy of the information received from the Information Center/ Call Center significantly lower than the students at the other community colleges. And the current students expressed concern about the availability of information prior to enrolling – information from the Admissions Office and the Financial Aid Office.

4. **Attitude Of Staff: Good**

   The current students at Hillsborough Community College agree with the secret shoppers and the non-enrolling applicants – staff at the College are friendly and courteous to the students.
ISSUES TO ADDRESS

The primary question facing Hillsborough Community College in this assessment was whether the College is providing a good student enrollment experience for the potential and current students based on the four standards of a good student experience. And if the College is not, then what needs to happen to improve that student experience? Based on the results of the Inquiry Scan, the Applicant Scan, the Non-Enrolling Applicant Scan, the Student Scan, and an evaluation of the current data for Hillsborough Community College, the following overall ratings are provided for the four standards of a good student experience:

1. **Availability Of Contact Channels: Good**

Potential and current students expect to be able to interact via several channels and at their convenience to have any issues resolved – they expect to have available to them multiple channels to contact, allowing them to interact with the college in the way most convenient for them. Hillsborough Community College provides potential and current students the ability to speak to a live person through the Call Center or to call staff directly, provides live chat (through the Call Center), requests for call-backs can be made, and emails can be sent to staff directly. And a student can walk onto any campus to gain information. Multiple channels for communicating with the College are available and open primarily during regular work hours Monday to Friday, but not after work hours on the evenings and weekends and definitely not available 24/7.

2. **Timeliness Of Responses: Poor**

The second standard for a good student experience is the timeliness of the response after making contact with the College through a preferred channel. Potential and current students want to be able to make quick, informed decisions and expect to speak with knowledgeable and responsive staff whether at the College, online, or on the phone. For the majority of the contact with the College, none of the responses were quick – and most never responded. The potential and current students were most likely to get a response from the Call Center, but virtually none of the voicemail messages left with staff were responded to and even welcoming letters with student IDs were not sent out. Several of the non-enrolling applicants who were interviewed were still waiting for acceptance letters nine months after the start of the Fall 2011 semester. This was reinforced through the information gathered in the survey of students, the Student Scan, in which response times to questions and concerns were consistently rated low. Only emails to campus personnel were answered in a timely manner.
3. **Accuracy Of Responses: Fair**

Accuracy of a response is the third standard for a good student experience. Receiving an answer quickly is important, but when potential or current students do not receive a satisfactory answer to their question, they will have to make additional contacts. And this was the case for Hillsborough Community College. For fairly simple questions, the information was accurate, but in the contacts with the Call Center and the College, the secret shoppers were given contradictory information from respondents – information that even contradicted the information on the College’s website. For example, when potential students call the College with a question about applying and do not receive a satisfactory answer – one that allows the students to proceed to the next step in the application process – they will call back. And they will most likely call back within minutes to get another person to speak with – increasing the call volume to the college, which happened multiple times to those asking for information at Hillsborough Community College during the scans. Nothing will impact the student experience more than being provided an incorrect answer – one that is acted on by the potential or current student, who is later told it was the wrong action.

4. **Attitude Of Staff: Very Good**

The final standard for a good student experience is the attitude of staff who responds to current and potential students. The staff member can actually make the difference in that student’s choice of a college to attend. When staff could be reached at Hillsborough Community College, the interactions were very good. There were a few instances in which less than stellar customer service was provided, in which interactions appeared rushed or emails were brusque, but overall staff was very helpful and this is supported by the excellent ratings in the survey of students, the Student Scan.

Upon examination of these ratings, the College has two areas in the student experience that needs immediate attention and improvement – the response time and the accuracy of responses – and improvements in these two areas can have the most impact on applicant conversion at Hillsborough Community College. A summary of the key issues and recommendations for Hillsborough Community College to increase their conversion of applicants into students and develop an excellent student enrollment experience include the following:

- **Centralize the applicant processing functions at the District Office and remove the processing from the individual campuses.**

Hillsborough Community College is considered one accredited institution with one financial aid code and five locations for service. In theory, each campus is responsible for
processing their respective applications and the student experience should be the same at each campus. However, based on the results of this analysis, this is not true in practice. Applicants may get very different responses to questions based on the campus they are working with. This becomes problematic when examining the attendance patterns at Hillsborough Community College. It is clear that students view the College as one institution with multiple locations in which to obtain courses and services – generally closest to where the student lives or works. Current students may be attending more than one campus location during a semester, getting services at more than one location. And if an applicant has an issue and a ticket is generated through HCC Live, while the applicant may have applied to one campus, the ticket and the question may be responded to by personnel on another campus. Then potentially personnel on another campus can be involved if there is a second or third question and ticket submitted. Add in the evaluation of transcripts and even more personnel can be involved in the applicant’s application. So while each campus is responsible for processing the applications for their respective campuses, an applicant may be touched by many different individuals across the campuses. Making sure that the enrollment processes and procedures are consistent across the College is extremely important in providing a good student experience.

By centralizing the application process at the District Office, there would be one consistent point of contact for the applicants and there would be more continuity of personnel focused on getting an applicant through the admission process. The Center could also have a virtual component in which applicants can live chat with personnel about their application and questions. This would also allow the College to easily implement the recommendations for a comprehensive communication plan. There is no way that staff at the campuses can implement an aggressive communication plan with applicants under the current structure. And this will free staff on the campuses to work with the current applicants and address the concerns of applicants – reducing long lines and frustration among applicants and staff.

- Completely redesign the current enrollment process (HCC’s Steps For Enrollment) at Hillsborough Community College to better assist the applicants in navigating the enrollment process at the College.

After examining the results of the Non-Enrolling Applicant Scan and experiencing the enrollment process at Hillsborough Community College, it has become clear that the current order of the “Steps For Enrollment” is adding to the confusion over the process and that information needed to be successful in the process is not being communicated early enough in the process. The current steps to enrollment at Hillsborough Community College are to be performed in the following order as per the website:
The steps for enrollment start with an application. But one of the major issues that the applicants have is the residency issue, which they have to fill out on the application. And until an applicant is in the application, there is no indication how complex the residency issues are with respect to the information that is needed to complete the application. The second step is to fill out the FAFSA and start the financial aid process. Again, there is little indication of the information that will be needed by an applicant as the FAFSA application is filled out, adding to the confusion and complexity of the process. The third step is to submit transcripts to the College for both high school and any other college attended – but there is not feedback as to whether the transcripts are received and the backlog for evaluating transcripts is almost a year. The fourth step is to take the placement test or submit ACT/ SAT scores (if within last two years) – but to test, the applicant has to get a testing referral from an advisor or counselor at HCC and that means a trip to campus to get the approval for the appointment. The next step that is required is to attend campus orientation but to attend orientation, the applicant has to meet with an academic advisor and be sure that all their paperwork is submitted – which necessitates more calls and visits to the College. And then after meeting with an advisor, the applicant attends orientation, which has all the information they
needed to know before they even started the process. And if they finally get through the process, they register for classes and then pay. Basically the only thing that the applicants get in the orientation that they have not yet experienced at the College, with no information provided earlier, is how to select the classes and pay.

The entire process needs to be re-ordered, especially in light of the issue that the College is sending little or no information to the applicant to guide them through the process – many are receiving one letter and a couple of emails – none of which will assist them in moving through the process as an informed applicant. It is suggested that the College consider reordering the “Steps To Enrollment” in the following manner:

1. Apply to HCC using the online application.

   The website should provide detailed information that the applicant will need to have to prove residency at Hillsborough Community College prior to the opening of the application – and there should be pre-application pages that outline the items applicants need to collect prior to starting to complete the application. On the application itself, to assist in communicating with applicants, the applicants should self-identify the type of student – recent high school graduate, transfer students, international, etc. This will assist in the development of the correct communications for the applicants.

2. Attend a mandatory “Enrollment Planning Session” or complete the “Enrollment Planning Session” online.

   Upon submission of the application, a hold is placed on the account until attendance at an “Enrollment Planning Session” (or online completion of a session). At the end of the application, it should note that the applicant has to attend a mandatory “Enrollment Planning Session,” or complete online, and go directly to an online sign-up. Currently, the applicants have no information about what they will have to do in the process prior to experiencing the process. The College should establish “Enrollment Planning Sessions” that will run multiple times during the day, evening, and weekend each week. The purpose of this session is to outline the steps in the enrollment process and to provide the information needed – how to set up HawkNet, who has to take a placement test, how to submit scores, transcripts, etc. This would also allow the leader of the session to explain the importance of the placement test, who has to take it, and how to do well on it – resources they can use to practice before the test. If a computer is available in the session, applicants could then sign up for a testing time. Applicants
who commit and sign up for appointments are more likely to commit to the process and follow through. And information could be provided in these sessions about how to apply for financial aid and who should be applying.

These sessions, whether in person or online, would answer the questions that are being asked at each stage of the process in the current system. Checklists would be created for applicants along with contact information, addresses to send transcripts to, etc. The person conducting the group would also be available to the applicants as their “personal resource” through the process. This could potentially eliminate many of the calls and lines at the College and address the issue that many applicants had about wanting an appointment. Rather than walking in and taking their chances that someone will be available to talk to them or standing in a long line, the applicants can schedule the session and attend at their convenience. And this would also provide a gauge of the commitment of the individuals as to their enrollment intent.

3. Apply for financial aid.

The College has made major progress in awarding financial aid prior to the start of the semester and the progress that has been made should continue. Since so many of the questions from applicants to the College are about financial aid, the College may also consider hosting financial aid planning workshops for the applicants – either immediately following the “Enrollment Planning Sessions” or at other times.

4. Submit transcripts.

Information on the College’s website needs to be expanded to explain what transcripts have to be provided, within what time frame, and where to submit. The College has to move away from an internal mind set of “just bring them to us” and to a centralized submission point – preferably electronically.

5. Take College placement tests or submit scores.

Again more information should be provided on the College’s website about who has to test, how to prepare for the tests (resources), and the importance of the tests. The College should examine what information is needed prior to testing – what is required of the applicant who should not have to test – and then make sure that it is an easy and timely process to submit the information and know that it has been received.
6. Attend advising session.

The College should consider group advising based on intent from the application – especially for the 19 and younger applicants. The applicants will sign up for an advising session and the first part of the session is an orientation about how to register for classes and the services available at the College. Then the applicants are split into groups by intent and break into smaller sessions to talk about what they need for their degrees or to transfer. Applicants can only attend when all their information – test scores, transcripts, etc. – have been received. At the check in for the advising session, the applicants are given a sheet with all their information that an advisor will use in advising them – test scores, transcript evaluation, etc. The group leaders then work with the smaller groups to outline class schedules and answer questions and these groups can even move into computer labs to complete the process.

Currently, the College is trying to work under a model that is staffed for fewer applicants than the College is now serving. Recognizing that there will be few additions to staff, the College has to develop ways to move away from ratios of 1:1 (applicant to staff) and move to multiple applicants to one staff member. By better utilization of self-help, the College can also eliminate lines and confusion. This will also solve the issue that has been one of the biggest complaints – having to come to campus and then standing in a long line not knowing when one will be done. The sessions will be at set times that the applicant can work their schedule around and know how long they will be at the College. This does not mean that the applicants will not have to come to the College and meet with advisors, especially those with issues, but it will make it easy for those who do not have issues and can be served in a group setting.

If an applicant cannot attend an advising session, the same information sheet that would be presented to the applicant at an advising session, should be available in HawkNet. That way the applicant has all the information needed to see the advisor and it should not require another trip to the advisor to set classes. For online applicants, the registration hold would be lifted after the sheet is completed and tele-advising could occur.
7. Complete class registration and pay for classes.

The hold to register is taken off as soon as the information sheet is printed for the advising session. After attending an advising session, if the applicants did not complete their registrations, then they will do so and pay for classes.

What the proposed changes in the current process attempts to do is solve three major issues at the College:
- Providing the right information at the right time – even prior to when an applicant needs it to make forward progress through the enrollment process
- Minimize lines and allow the current staffing to handle more students efficiently
- To increase the applicant to enrollee conversion rate and focus on the applicants who are most committed to enrollment

- Create “Steps To Enrollment” for each of the major profiles of applicants at Hillsborough Community College.

Based on the profiles of applicants at Hillsborough Community College, there are at least seven groups of applicants for which the College should consider developing different “Steps To Enrollment,” and those groups include:

1. First Time In College

The first time in college group most likely should be split into two groups for the “Steps To Enrollment” – those who have completed high school in the last two years and those who have been out of high school more than two years or completed a GED. Almost half of the applicants to the College will fall into the first time in college group who have completed high school in the last two years. The steps to enrollment for this group should be completed first since it is the path for the majority of the applicants.

2. Transfer-In Students

The applicants who have some college credit, regardless of age, will have to produce college transcripts and they will need to be evaluated, and they will likely not have to take placement tests.
3. Degree-Holders

Adults who have college degrees and are looking at career changes or skills upgrades who prefer to take college classes for credit will have a “Steps To Enrollment” similar to the transfer-in students since they will have college credits and be likely to not need placement tests, etc.

4. Dual-Enrolled Students

The current high school applicants who are attending Hillsborough Community College for college credit will require a different “Steps To Enrollment” since there are additional forms and approvals needed to enroll.

5. Transient

The college students who are attending four-year colleges in the area or who are home for summer and want to pick up a few credits at Hillsborough Community College – those who will never be Hillsborough Community College students – should have a different “Steps To Enrollment” and the process to enroll – as long as they have good standing at their own colleges – should be fast-tracked by providing a current college transcript.

6. International Students

The complexity of enrolling an international applicant at a college in the United States has increased greatly since 9/11. The understanding of the forms that have to be completed and visas needed requires specialized training and a much more complex “Steps To Enrollment.”

7. Veterans

There is an anticipated increase in the number of veterans who will be attending college in the next few years as the men and women in the armed services return to the United States, and the rules and regulations for veterans to take advantage of their educational benefits are complex. A detailed “Steps To Enrollment” is needed as a resource to walk the veterans through the process.
These are the most obvious groups that will need to be outlined in the “Steps To Enrollment.” It is also recommended that after the processing for the application is centralized, that there be “experts” assigned in the centralized processing center to work directly with specific groups to answer either campus personnel’s questions when they are dealing with a specialized enrollment or to whom the campus personnel can refer the applicants in specialized groups. For example, the “experts” that would be needed may include a Veteran’s expert, an International expert, and a Dual-Enrolled expert.

Finally, after the “Steps To Enrollment” for each group is defined, the information will be detailed and put on the College’s website to allow each group to self-identify and checklists be provided for each group that can easily be downloaded from the website or printed directly from the site.

- Create a comprehensive communications plan for all enrollment profiles defined by the College and program the College’s customer relationship management system (CRM) to automatically deliver the needed communications.

A major issue for the non-enrolling applicants surveyed was the lack of communication – not even receiving the letter with the student ID – and the inconsistency in communications to all the applicants – some received letters, some received emails, some nothing. Overall, almost half of the non-enrolling applicants did not receive any information from the College after applying and the remaining non-enrolling applicants noted that the information they received was inconsistent from person to person. There was not a consistent pattern of information being communicated with the non-enrolling applicants. When the non-enrolling applicants were asked to make suggestions to improve the application process, the major focus of the suggestions was better communication with them from Hillsborough Community College during the process. Several of the non-enrolling applicants were still waiting to see if they had been accepted by the College – nine months after the start of the semester which they had applied for.

For the applicants that Hillsborough Community College may be competing for – those who applied to other colleges – not communicating with them is an excellent way to make sure the applicants go to another college. One non-enrolling applicant even noted they never knew if they were accepted by Hillsborough Community College but had applied to another college and were bombarded with information from the other college – which the applicant ended up attending. National research also indicates that to enroll an applicant, it generally takes five to seven contacts with the applicant to move them through the process. And add in the stealth applicants – those who never make themselves known to
the College until they apply – and increased communication is essential for successful enrollments.

Currently, Hillsborough Community College does not have a well-defined and robust communication plan for inquiries or applicants. The immediate need is to write an applicant communication plan and then to develop the inquiry communication plan. After the communications are written, they will then need to be moved into the customer relationship management system at the College. This will require a collaborative effort of staff from marketing, admissions, recruitment, registration, financial aid, and information technology to work together to develop the communications plan and develop the specific communications for the inquiries and applicants. The CRM, when fully implemented, will allow all personnel at the College to track all inquiries to the point of application and beyond. Staff will be able to easily run quick lists of those who have applied and not registered and see for each inquiry what has been sent to the inquiry, the number of contacts, and outcomes of contacts, as well as send additional communications that have already been programmed into the system. This will assist the staff in follow-up on the applicants to the point of enrollment and registration. Mass emails, letters, etc. can be sent easily and quickly to the inquiries and applicants.

The current applicant communication plan consists of an automated email to the applicant’s personal email address, a letter that is mailed to the applicant’s home address, and an email that is automatically generated in the HawkNet account. Currently, the letter to the applicants is not an automated process, but one which relies upon personnel to actually “hit a button” to print a letter. This function needs to be automated and moved to a centralized admission processing center and not occur at the campus level. The following is a basic level of communication that should be developed for the applicant communication process:

1. An automated email sent to the applicant’s personal email welcoming them to Hillsborough Community College and providing instructions for next steps
2. Acceptance letter mailed to the applicant from the President, congratulating them on their acceptance
3. An automated email sent to the applicant’s personal email with their student ID and how to set up their HawkNet account for all future emails and a letter mailed to the home address with the same information
4. An email to applicant’s personal email and a letter with a checklist of the next steps to be completed for enrollment at Hillsborough Community College specific to that profile
5. An email to applicant’s personal email, HawkNet email, and a postcard mailed to remind scheduling an “Enrollment Planning Session” with a landing page address that will allow registration for a session online or a phone number to call to schedule a session.

6. An Email to applicant’s personal email, HawkNet email, and an oversized postcard mailed encouraging application for financial aid – entitled “How To Pay For College”.

After these initial communications to all applicants, the communications for each group of applicants may vary depending upon their enrollment steps. For example, for the recent high school applicants, the following communications may be sent:

- An email to applicant’s personal email, HawkNet email, and a postcard reminder about submitting high school transcripts and the address to where the transcripts should be sent.
- An email to applicant’s personal email, HawkNet email, and a postcard reminder about submitting ACT/ SAT scores or scheduling a placement test with the website address to schedule the test.
- An email to applicant’s personal email, HawkNet email, and a postcard reminder about scheduling an advising session.

These communications can be resent to any applicant who has not completed a step. The key is to aggressively reach out to the applicants and work with them to complete the process. Through personalized email templates and variable printing, all of these communications can be customized for the applicant. The communications (paper and e-communications) should be critiqued by focus groups consisting of high school applicants, newly applied students, and current students for accuracy, interest, and effectiveness.

Finally, after the “Steps To Enrollment” have been outlined for each group, the communication materials can be developed. The College can also add in information about College clubs and organizations, services, etc. that would be of benefit to the applicant.

- **Evaluate the role of the Call Center at Hillsborough Community College to better define roles and responsibilities in the overall communication response system.**

The driving force behind Hillsborough Community College’s contract with the Call Center was the fact that phones at the College were not being answered. After contacting College personnel directly at the College through this process, that still appears to be the case. After instituting the Call Center, the College expected to see phone volume go down – instead
the call volume has increased. There are other community colleges in the country that are handling call volumes internally that are equivalent to the volume Hillsborough Community College was experiencing prior to the Call Center. After experiencing the Call Center, it is clear why call volume has increased – it takes multiple calls to actually get a response to a question, even routine questions. Hillsborough Community College has not clearly defined its expectations for the Call Center – other than to handle everything, which even the best Call Center cannot do.

Hillsborough Community College needs to examine the role and scope of the Call Center in light of the new communications plan and the implementation of centralized processing. With more aggressive communications and a better website, how much of the volume of the Call Center can be alleviated? And with improvements in online FAQs, many institutions are eliminating the need for expanded Call Centers. Should the role of the Call Center be the 24/7 component of the institution and what types of questions are best answered by the Call Center and what should be answered by HCC staff? By evaluating the types of information in the ticket system, the answers should become clear as to the role and scope for the Call Center. However, this information was not provided to the consultants for review and recommendations cannot be made without review of this information.

- **Focus on “Paying For College” on the Hillsborough Community College’s website.**

A major stumbling block for completing the enrollment process at Hillsborough Community College is paying for college. A majority of the non-enrolling applicants did not even apply for financial aid – there is an assumption that if they are working, then there is not any assistance available. Based on an interview with the Tampa Bay Workforce Alliance, 65 percent of the funding available for students goes to students enrolling in proprietary institutions, because they do a better job of enrolling applicants and getting them through the programs. And the proprietary institutions are actively referring individuals to the Workforce Alliance to get funding if they fit the parameters for the workforce funds (up to $3500 per year for two years). The groups that can be funded include dislocated workers on unemployment or whose unemployment is exhausted, displaced homemakers, and military separation; disadvantaged youth between 16 and 21 who are economically disadvantaged and have one other barrier (like less than a 3.0 high school GPA); and, economically disadvantaged adults. And funding is available for individuals who meet these criteria who are in targeted programs. The College should identify the targeted programs on their website and the individual programs available as well.
Hillsborough Community College needs to develop a series of web pages outlining all the ways that an applicant can pay for college – from explaining the requirements for Pell funding, to the availability of the state funding, as well as loans and scholarships. And for those applicants unsure whether they would even be eligible for financial aid, provide access to a financial aid calculator tool, such as http://www.aie.org/managing-your-money/finance-tools/efc_calculator/.

Finally, the College needs to develop an information sheet that all staff can hand out to individuals encouraging them to apply for financial aid with the landing page for “Paying For College” listed.

- **Develop enrollment events and utilize a marketing campaign to encourage application for Fall semester prior to June and pull the applicants through the enrollment process, especially among those applicants 19 and younger.**

A major issue for Hillsborough Community College is that more than half of their applications hit their system from June to September, overloading their personnel and their systems and causing frustration among applicants who have waited too long and expect immediate service and financial aid. While the College will never get rid of the older adults that “wake up and decide” to enroll, more than half of the applicants are 19 years of age and younger – recent high school graduates. The College needs to develop high school open houses to focus on getting in the applicants who are considering attending Hillsborough Community College or using the College as a backup college and beginning the application process; these should be held during time frames that staff is not buried in the enrollment process. Direct marketing (direct mail postcards) can be utilized to market these sessions with a message to get ahead of the others in their class and offer incentives, like guaranteed class seats, preferred parking, etc. to begin the process. A comparable direct mail campaign can also be sent to parents, emphasizing the need to secure seats at those colleges preferred and an underlying message in the direct mail campaign is to not get caught in the competitive process with no option.

By having an event – meetings held at Hillsborough Community College or at local high school – it is similar to a group advising session. The agenda for the group session would be an overview of the things that have to be done to successfully enroll at Hillsborough Community College – much like the material about how to navigate the process in the College’s current navigation process. A key in this session is to explain financial aid, residency, and placement testing (as well as ACT/ SAT scores). Paper materials can be developed for the workshops that provide a checklist of the things that have to be done to
enroll and direct contact information for those responsible for assisting these groups in following through the enrollment process. These sessions could be set for early Spring (February and March), and the applicants attending would be targeted for direct communications from then until May to June – with a goal of seeing them through the enrollment process by June.

- **Develop a direct marketing campaign aimed at the non-enrolling applicants from the last three years to encourage them to return to Hillsborough Community College and enroll.**

While 34 percent of the non-enrolling applicants actually attended another college after applying to Hillsborough Community College, 66 percent did not and more than 90 percent do plan to enroll in college later – and more than 80 percent would consider enrolling at Hillsborough Community College. For many of the non-enrolling applicants, Hillsborough Community College was the only college they were interested in attending. While the reasons for not following through and enrolling varied, lack of money, work, and not getting the process completed stopped many of the non-enrolling applicants that did not enroll at another college.

Hillsborough Community College should develop a postcard series for the non-enrolling applicants to be sent as reminders for the dates and deadlines for the next semester for enrollment to those who have applied in the last three years. For example, a postcard can be sent in mid-Fall announcing the federal financial aid deadline for the Spring and Summer and reminding the non-enrolling applicants that they should move ahead now and apply for financial aid. Another postcard can announce the testing dates, or that registration is now open for Spring 2012. These postcards should be consistently sent to the list each semester.
HIGH SCHOOL MARKET SEGMENTS

To clearly define the market segments at Hillsborough Community College, it is important to examine the enrollments at the College by age. The age of the student directly impacts the marketing efforts that have to be developed to successfully attract students to the College, and each age group is affected by generational characteristics that will impact how the potential students will react to messages from the College, interact with the College, and form their expectations of programs and services. Generationally, there are four segments that are potential students for Hillsborough Community College – Generation Y, Generation X, Baby Boomers, and Matures.

Generation Y is defined as those students roughly 16 to 24 years of age – recent high school graduates and younger adults who are the most likely to attend college. This generation is defined by hip hop, teen pop, and alternative music; long-running, animated series such as SpongeBob SquarePants, the Simpsons, and South Park; and fashions such as hip hop, emo, preppy, punk, and scene. Those in Generation Y generally share the cynicism of all things with their older counterparts, Generation X, but those in Generation Y are also somewhat more religious and more socially liberal. Generation Y gave us “helicopter parents” – doting Baby Boomer parents. Politically, this generation could be described as moderately liberal, more likely to be pro-choice, and somewhat less likely to support the death penalty. Generation Y was raised without racism – colors are not seen in contrast to previous generations. And this generation is very pro-environment. Generation Y has interacted with technology since birth – life without mass media and video games is simply unfathomable and daily life depends on technology. The speech of this generation is far more informal, and due to texting and internet communications, abbreviations and misspellings are intentional and used for effect. This has also led to fewer distinctions when addressing authority figures, friends, and acquaintances.

Generation X is the most cynical generation. This generation was the first generation of “latchkey” kids – kids who came home to empty households after school – and this was the first generation in which children were exposed to frequent daycare and divorce. Today, Generation Xers are between 25 and 44 years of age. Generation X has the lowest voting participation rate of any generation. The adults in Generation X are characterized by high levels of skepticism, “what’s in it for me” attitudes, and a reputation for some of the worst music to ever gain popularity. As Generation X moves into adulthood, the sole focus is on family – spending time with spouses and children. The divorces experienced when they were children have impacted the adults in Generation X – it has shaped how they spend time with their families and their “family first” attitudes. The adults in Generation X are also the best educated in history. But the cynicism of Generation X carries through to purchases – consumer transactions have to happen quickly and
the best bargains are shopped for electronically. From this Generation came websites like Travelocity, which offers the best and lowest price electronically with no haggling.

Some say Baby Boomers run the world, especially the Baby Boomers. This generation is typically defined as adults between the ages of 45 and early 60’s. A single, defining historical event of the Baby Boomer Generation was the Vietnam War. Baby Boomers, even as they age, continue to fight against injustice – they are responsible for the women’s movement, the civil rights movement, Vietnam War protests, and much more. But one thing culturally unites the Boomers like no other: television. The Baby Boomers were the first generation raised on TV. They could share cultural events and milestones with everyone, no matter where they were geographically. They all watched “Bonanza” or “Leave it to Beaver,” and saw the Vietnam War in their living rooms while they were coming of age. Rock and Roll also gave this generation their identity and they still listen to classic rock today. But Baby Boomers put their trust in themselves. They got married later, had kids later, and spent lavishly on themselves because they could. The Baby Boomers worked hard to get ahead – educationally, financially, and personally. As they moved up the corporate ladder, they moved up to larger homes and more expensive cars. As they age, they do not want to be reminded of it and will spend for products to keep them young. And they never plan to retire – even if they retire from a successful career, they will attend college to start another career. The Baby Boomers are true lifelong learners.

The Mature Generation – also known as Veterans, the Silent Generation, and the Greatest Generation – is comprised of adults who are over 60 years of age. These older Americans hold three-quarters of the nation’s wealth and are the executive leaders of some of the most established and influential companies in America. The Mature Generation not only survived the Great Depression of the 1930’s but was instrumental in shaping the United States as an economic and military power. Patriotism, teamwork, “doing more with less,” and task-orientation very much define this generation. Rules of conduct, respect for authority, and following directions are all very important touch points for this generation. The Mature Generation boasted the first true innovators. The adults in this generation are responsible for putting a man on the moon; creating vaccines for many diseases including polio, tuberculosis, tetanus, and whooping cough; and laying the foundation for today’s technological innovations. This Generation moved from farms and cities to a new kind of community – suburbia. And this Generation is frugal – the older adults will argue over a 10 cent difference in their light bills – and since they grew up with shortages, they are likely to hoard household materials.

So which of the generations is Hillsborough Community College successfully enrolling? To answer this, the number of students enrolled by age for the Fall 2008 and Fall 2011 semesters are presented in the chart on the next page.
Hillsborough Community College is most successful with Generation Y – the recent high school enrollees. In Fall 2011, 54.4 percent of the enrollees at Hillsborough Community College are in Generation Y, a slight drop from Fall 2008 where 56.6 percent were in Generation Y. Overall, in Fall 2011, 23.1 percent of the enrollees were 19 years of age and younger, 31.3 percent were 20 to 24 years of age, and slightly less than four percent were high school students enrolled in college classes (dual enrolled). The remainder of the enrollees at Hillsborough Community College in Fall 2011 comprise the adult generations – almost 30 percent are in Generation X, five percent are Baby Boomers, and less than one percent are Matures. The ages of the non-credit clock hour students are unknown, but they are purported to be adults and they comprise only seven percent of the total enrollment at the College in Fall 2011.

When evaluating the high school market, three distinct groups in Generation Y are examined – dual enrolled high school students (those attending high school and college simultaneously), high school graduates 19 years of age and younger, and those students 20 to 24 years of age. Generation Y represents the high school market of today and young adults that colleges are trying to attract to classes.
As seen in the chart above, the greatest percentage growth in enrollments at Hillsborough Community College among the high school market segments has been in the full-time and part-time dual enrollment students. From Fall 2008 to Fall 2011, the number of full-time dual enrollees increased 17.6 percent and the part-time enrollees increased 80 percent. But, the dual enrollees at Hillsborough Community College only account for less than five percent of the College’s total enrollment for Fall 2008 and Fall 2011. The percentage of 19 and younger enrollees, full-time and part-time, at Hillsborough Community College has slightly declined from Fall 2008 to Fall 2011. In Fall 2008, the 19 and younger segment comprised 26.3 percent of the enrollments at the College, but that has dropped to only 23.1 percent of total enrollments by Fall 2011. From Fall 2008 to Fall 2011, full-time enrollments in the 19 and younger segment dropped less than one percent (0.4), while the part-time enrollments declined 7.3 percent. However, there has been an increase in the 20 to 24 year old market segment at the College. Full-time enrollments in the 20 to 24 age group increased 26.5 percent from Fall 2008 to Fall 2011 and part-time enrollments increased 6.9 percent. Overall, this segment still accounts for slightly more than 30 percent of the total students at Hillsborough Community College for both years (30.3 percent in 2008 and 31.3 percent in 2011).

In the last few years, dual enrolled classes are becoming more popular with high school students and parents, and even replacing AP classes at some high schools. Parents and high school students are seeing the value of obtaining college credits in commodity courses like English, math, and the
humanities that are virtually guaranteed to transfer to a college. While the AP classes also offer the same possibility, at the end of an AP class, students do not receive credit until the AP test is taken, and depending on the college of interest to the high school student, their score may not be high enough to receive credit. But with the dual enrolled classes, if they are successful in the class, they will receive credit. With the increase from 2008 to 2011 in dual enrolled students, and an expectation that the increase will continue, Hillsborough Community College needs to examine the conversion of the dual enrollees into enrolled students at the College immediately after high school graduation. In other words, how many of the dual enrolled students actually enroll at Hillsborough Community College after high school graduation, or to convert to enrolled college students? From 2008 to 2011, the number of dual enrollees at Hillsborough Community College has been increasing – from 591 students in 2008 to 1,053 students in 2011.

The chart above presents the conversion of the high school dual enrollees over the last four years into Hillsborough Community College students. Conversion is defined as a student who is enrolled at Hillsborough Community College as a dual enrolled student during high school, and then who enrolled at Hillsborough Community College in the Fall following their Spring high school graduation. As seen in the chart above, in 2008, 27 percent of the dual enrollees in Hillsborough County actually followed through and enrolled at Hillsborough Community College in 2008 after their high school graduation. This dropped to 18.9 percent in 2009, 21.2 percent in 2010, and 20.3 percent in 2011. At other community colleges across the country, the greatest enrollment growth in the last few years has been in the dual enrolled market – both in numbers of enrollees.
and the conversion of the enrollees into students after high school graduation. This is not the case for Hillsborough Community College. While the number of dual enrollment students is increasing at the College, and that increase is expected to continue, the conversion of the dual enrollment students into Hillsborough Community College students is not increasing. If the funding model for the dual enrolled students in Florida changes to provide more incentive for Hillsborough Community College to actively increase their numbers, the College will also need to examine strategies to increase their conversion rate of dual enrolled students into College students.

But the key question for Hillsborough Community College in the high school market is whether or not there is additional room for an increased market share. The answer to this question is based on the number of high school graduates in Hillsborough County, the current K-12 enrollments in the County, and the number of enrollees from these high schools currently enrolled at the College.

As seen in the chart above, the number of high school graduates in the College’s primary service area, based on current enrollments in the K-12 system in Hillsborough County, increased from 2010 to 2012, and that increase is expected to continue to 2013, drop slightly in 2014, and then level off from 2015 to 2022. In a majority of the market areas for other community colleges in other states, the number of graduates is expected to be in major decline after 2015.

The best measure of how well a community college is doing among the high school market is by calculating high school market share. High school market share is the percentage of the number of high school graduates at a high school in the Spring who follow through and enroll at
Hillsborough Community College in the Fall. The best scenario for a community college is to be increasing the percent of high school students who enroll from a graduating class in a market that is increasing. The worst scenario is to be losing market share in a high school market that is in decline. For Hillsborough Community College, over the next few years, the number of high school graduates is forecasted to slightly decline. This will mean that the College will need to see an increase in high school market share to maintain current enrollment.

As seen in the chart above, from Fall 2008 to Fall 2010, Hillsborough Community College has seen a slight increase in their high school market share. The high school market share has increased from 27 percent in 2008 to 28.23 percent in 2010. Based on the forecasts of high school graduates and the College’s current market share, the challenge for maintaining enrollments at the College for the next three to four years will be to increase market share in a slightly declining high school market.

In order to accomplish that, the College needs to understand its current market position among the high school students and the willingness of the high school students to attend Hillsborough Community College after high school graduation. To provide that understanding, a survey was conducted by telephone of 350 high school students in Hillsborough County from June 14 to August 9, 2012, providing a reliability of 95 percent and a margin of error of ± 5.2 percent. The sample was stratified by the zip codes across the County.
KEY RESEARCH FINDINGS
Based on the results of the High School Scan and the Counselor Scan, the following is a summary of the main issues that need to be addressed to increase enrollment of high school students.

POTENTIAL MARKET SHARE
Based on the results of the “what college are you likely to attend” question, four market segments have been defined for Hillsborough Community College among high school students in the service area. The “First Choice” market segment represents 25 high school students, or seven percent of the high school students interviewed, who have Hillsborough Community College as their first choice college. The “Backup” market segment represents 30 high school students, or nine percent of the high school students interviewed, who would choose to attend Hillsborough Community College as a backup, or as a second choice, and they listed the College in their list of colleges to attend. The “Maybe, If” market segment represents 129 high school students, or 37 percent of the high school students interviewed, who would attend Hillsborough Community College if their first choices fall through due to grades or finances. Finally, the “No Way” market segment represents 166 high school students, or 47 percent of the high school students interviewed, who would never choose to attend Hillsborough Community College.

With an overall market share of 28.23 percent in Fall 2010, Hillsborough Community College has been successfully converting 12 percent of the “Maybe, If” market segment (overall market share of 28 percent less seven percent “First Choice” and nine percent “Backup” groups). However, there is current market potential for Hillsborough Community College with another 25 percent representing the “Maybe, If” group not attending. The College will need to focus on conversion of the “Maybe, If” group to sustain the potential loss in the upcoming years for market share, given the decline expected in the number of high school graduates in the next few years.

MARKET AWARENESS
The first question asked of the high school students was “When you think of colleges in the area, which ones come to mind?” This is a test of unaided awareness. In other words, the college mentioned first in the test of unaided awareness is the one most familiar to them.

As would be expected, Hillsborough Community College had the highest unaided awareness among the “First Choice” market segment with 52 percent of the high school students in this group recalling Hillsborough Community College first in the test of unaided awareness. However, 40 percent of the “First Choice” market segment mentioned the University of South Florida first. Hillsborough Community College was mentioned by 30 percent of the “Backup” market segment in the test of unaided awareness, but it did not have the highest unaided recall among the high
school students in this segment. Almost half (47 percent) of the market segment listed the University of South Florida first in unaided awareness. Only eight percent of the high school students in the “Maybe, If” market segment listed Hillsborough Community College first in the test of unaided awareness but 61 percent of the high school students in the “Maybe, If” group listed the University of South Florida first in the test of unaided awareness. The high school students in the “No Way” market segment were also not likely to list Hillsborough Community College first in the test of unaided awareness – only five percent – but 55 percent of the market segment mentioned the University of South Florida.

Another test of awareness for Hillsborough Community College is the overall familiarity of the high school students in the service area with the College. This was tabulated by adding all the high school students who mentioned a college as one of the total responses in the test of unaided awareness. At least among the “First Choice” group, Hillsborough Community College’s overall familiarity was higher than the University of South Florida. In the “First Choice” market segment, 84 percent listed Hillsborough Community College as a college in the area and 60 percent listed the University of South Florida as a college in the area. In the “Backup” market segment, familiarity with Hillsborough Community College is also high – 73 percent of the high school students in the segment are familiar with the College. However, 77 percent of the high school students in the “Backup” segment are also familiar with the University of South Florida. Eighteen percent of the high school students in the “Maybe, If” market segment are familiar with Hillsborough Community College, but 82 percent are familiar with the University of South Florida and 32 percent are familiar with the University of Florida. The high school students in the “No Way” market segment are actually more familiar with Hillsborough Community College than the “Maybe, If” market segment – 24 percent of the high school students in this group recalled Hillsborough Community College as a college in the area – but 78 percent were familiar with the University of South Florida.

The major issue facing Hillsborough Community College among the high school market that would consider attending, the “Maybe, If” group, is that the College is not top of the mind for the high school students. If Hillsborough Community College is not being thought about – until the last minute when choosing a college – then it is difficult to position the College as a viable option and not a “last resort” or “backup” college.

**IMAGE**

There are two image issues in the high school market that Hillsborough Community College must address. Many of the potential high school students do not know enough about the College to describe a student who attends, and the high school students have a slightly negative view of the students who attend Hillsborough Community College. When their view is negative, it is difficult
for the high school students to see themselves attending Hillsborough Community College. As would be expected, the students who would consider attending were more positive in their descriptions of a student who attends Hillsborough Community College than the students who would not consider attending. The “First Choice” market segment was likely to describe the typical Hillsborough Community College student as hardworking and dedicated, normal, and smart. But not all students in the “First Choice” market segment are positive – they describe a Hillsborough Community College student as average, did not do well in high school, low GPA scores, really lazy, and works a lot. The high school students who are in the “Backup” market segment will also consider attending Hillsborough Community College, but it is not their first choice. The students in the “Backup” group who were positive toward the College are likely to describe a typical Hillsborough Community College student as kids from high school, hardworking, does not want to pay full price for a university, normal, and smart, but for those not so positive about the College, they described the students as did not apply themselves in high school, ghetto, less fortunate, slacked off in high school, and not a lot of money.

The “Maybe, If” market segment tended to describe a Hillsborough Community College student in terms of academics and cost – low GPA, couldn’t get in anywhere else, and financial problems. But a few also noted the Hillsborough Community College students were hard workers and smart. The high school students in the “No Way” market segment were also likely to describe Hillsborough Community College students in terms of poor academics, specifically as average, students who couldn’t get into a university, and those who want to say close to home and do not know what they want to do.

A major issue for Hillsborough Community College is to provide messaging for the high school market that will make Hillsborough Community College an acceptable option for the students in the “Backup” and “Maybe, If” groups. While these groups appear to understand the major benefits of attending the College – cost and close to home – it is not seen as an educational institution in which they see themselves. These groups consider themselves as very good students and do not perceive that Hillsborough Community College is a college for them.

EDUCATIONAL GOALS
More than 80 percent of all the high school students believe that at least a four-year college degree is needed to achieve their career goals. Forty-nine percent of the high school students in the area believe a four-year degree is needed (regardless of whether they would consider attending Hillsborough Community College) and 34 percent of the high school students in the service area believe a graduate degree is needed for them to achieve their career goals. Only five percent of the high school students believe that a two-year degree is all that is needed. Even the high school students in the “First Choice” market segment do not believe that a two-year degree is all that is
needed for them to attain their career goals. Fifty-six percent of the students in the “First Choice” group believe a four-year degree is needed while only 16 percent believe a two-year degree is needed to attain their career of choice, and eight percent believe a graduate degree is needed. In the “Backup” market segment, 47 percent of the high school students believe they need a four-year college to attain their career goals, 27 percent believe a graduate degree is required, and only 13 percent believe they will require a two-year college degree to meet their career goals.

The students in the “Maybe, If” and “Backup” market segments are most likely to believe a graduate degree is needed for them to attain their career goals – 37 percent of both groups note a graduate degree is needed – while 47 percent of the students in the “Maybe, If” market segment report a four-year degree is needed, as do half of the students in the “No Way” market segment. Based on these results, the majority of the high school students are seeking bachelor’s degrees, and their educational goal even if they did attend Hillsborough Community College is transfer to a four-year college.

SEEKING INFORMATION AND INFLUENCERS
The majority of the high school students who are planning to attend college have begun to seek information about specific colleges they are interested in attending. The “Maybe, If” and “No Way” market segments are the most likely to start early – almost 20 percent started seeking information about colleges in grade 8 or earlier, one-fourth started in grade 9, and by grade 10 more than three-fourths of the students in these segments had information about colleges they were interested in attending. On the other hand, the students in the “First Choice” and “Backup” market segments were less likely to get an early start on seeking information about colleges – they were much more likely to wait until grade 10 or 11 to begin seeking information (almost half).

The information about college starts in middle school, with teachers and counselors giving the students two key messages: (1) telling the students they need to go to college and its importance and (2) what the students have to do in high school to get into college (good grades, required classes, requirements). In high school, the students still interact with counselors and teachers, but the information received shifts to the specifics of getting into college. Specifically, the information they are receiving in high school includes how to pay for college (scholarships and Bright Futures), importance of grades and GPA, requirements to get in, and applications. At this point, more than 80 percent of the high school students are also discussing college with their parents and the conversation then narrows to specific colleges – the students’ parents provide information about specific colleges (ones they would like to see their child attend), talk to them about specific colleges, and have an active role in assisting their child choose a college to attend.
By the time applications are filled out for a specific college, the high school students have had information from three key influencers – counselors, teachers, and parents. If the influencers do not have positive feelings about Hillsborough Community College, it is less likely that the College will be viewed as an option by the high school students. This is also supported by the usage of information sources by the high school students. While they are likely to go online to find information, the students are very likely to rely on what parents, family, and friends tell them about a college; their high school teachers and counselors; and attendance at a camp, program, or competition at a college during high school.

IMPORTANCE OF WEBSITE AND SOCIAL MEDIA
High school students have grown up with internet access in their homes, and with mobile access via internet-enabled cell phones, even more of the generally under-connected populations (minorities and lower income) are becoming connected. When high school students were asked what sources of information they were likely to use to gain information about a college, the college’s website was one of the most important factors. More than 96 percent of the high school students in Hillsborough County have internet access, most likely through a laptop or a tablet. And when asked how they search for information about colleges, more than 90 percent Google the college name to find the website, or go directly to the college’s website. Almost three-fourths of the high school students have visited colleges’ websites and they have visited an average of seven sites, more than half in the last month. The primary information being sought on the colleges’ websites by the high school students is program information – the programs and majors offered by the College – as well as the requirements to get into the college and the program. The major financial information being sought on the colleges’ websites is the availability of scholarships – it outweighs even cost. Other information that the students seek on a college’s website is student life – what the college has to offer the student with respect to sports, clubs, dorms, and extracurricular activities. When on a college’s website, access to interactive features is important to the high school students. The most important online features for the high school students are an online application, online course catalog, the campus visit request form, the cost calculator, a virtual tour, and e-brochures.

While 79 percent of the high school students have a Facebook page, only 39 percent of the students have visited a college’s Facebook page, but 70 percent plan to do so. Interestingly, the “First Choice” market segment – the most likely to attend Hillsborough Community College – is also the most likely to visit a college’s Facebook page and the “First Choice” and “Maybe, If” groups are the most likely to friend or like a college on Facebook. A college’s Facebook page is an important source of information about a college for students. The primary information they are looking for on a college’s Facebook page is general information about the college, the comments or what the students are talking about (both positive and negative), the location, events, photos of
the campus and campus life, and updates about the campus. The high school students are using Facebook to get the “feel” of the college – a better look at students’ experience at the college with respect to what is being talked about. Facebook will need to be managed closely by Hillsborough Community College to reflect the positive aspects about student life and not be a location for complaints.

Thirty-one percent of the high school students have also viewed videos on YouTube about a college, and the primary topics they viewed are student and campus life and activities. It is anticipated that the percentage who will view videos will increase. At this time, only 28 percent of the high school students have visited a college’s website using a cell phone enabled with internet access. For those who have visited, the information they are seeking includes cost, location, majors, and information on the application process. It is also anticipated that more students will be searching Hillsborough Community College’s website via a mobile device in the future and the College must have a mobile interactive site. And finally, while 96 percent of the high school students text on their cell phone, 68 percent of the high school students would allow a college to text information to them – basically anything.
ISSUES TO ADDRESS

After an in-depth look at the current marketing and recruitment activities for the high school market at Hillsborough Community College, the current marketing materials, and the research results, the following recommendations were made for the College to increase high school market share.

ORGANIZATIONAL ISSUES
The Enrollment Development Coordinators (EDCs) are principally responsible for enrollment development (recruiting) at Hillsborough Community College. The EDCs report to the Dean of Student Services on the campus where they reside and there is little direction from the District as to their priorities for enrollment development. After discussions with the EDCs, the enrollment development expectations for the EDCs are unrealistic – they are expected to recruit in the high schools, attend all community events, meet with employers, visit churches and libraries, visit with target populations, work with inquiries and applicants, etc. While all the EDCs noted that they support the campus’s enrollment goals and their jobs vary, the majority of the tasks being performed by the EDCs are the same across the campuses. In addition, given the campus, there is little budget to support the outreach and enrollment activities. For example, at one campus, the copying needed by the EDC is paid by the Admissions office and the mileage to attend events is paid by an academic department. Therefore, it is recommended:

- Develop district enrollment goals for the high school market share for each campus and budget for goal attainment and re-evaluate the role of the EDCs in enrollment development.

To fairly evaluate employees, they need to have defined, realistic goals for their job. This is not the case at Hillsborough Community College. First, the job descriptions for the EDCs across the College need to be examined and re-written to better define the role and scope of the expectations for enrollment development for the EDCs, providing consistency across the District. The job descriptions for the EDCs need to reflect the enrollment goals for the College. When the job description is redefined, a name change should be considered, such as Outreach Specialists.

Next, the College has to develop an enrollment management plan that has measurable goals for enrollment for the College by market segment. These enrollment goals should drive the job duties of the EDCs. For example, the high school market is very important to the overall enrollment growth at Hillsborough Community College. The enrollment management plan should outline the high school market share targets for each year by
campus. This will allow the EDCs to prioritize their time given the enrollment targets, but also allows flexibility for the EDCs to conduct activities specific to their respective campuses.

To support the enrollment management plan, the District needs to provide funding to support the priority outreach activities of the EDCs. The funding would support the top priorities of the enrollment management plan.

Finally, the EDCs have to be supported by the Marketing Office at Hillsborough Community College and they need closer coordination with the Marketing Office. For example, if the Marketing Office is planning a direct mail campaign, the EDCs need to be alerted to the campaign prior to the implementation. The EDCs noted that in the past they never knew when a media flight would occur; generally a media flight will push inquiries and the EDCs may not be ready for the push. The EDCs need to meet with the Marketing Office monthly to synchronize the activities that will occur in outreach.

- Implement Datatel Recruiter to provide a communication system from inquiry to enrollee.

A key in recruiting students to the College is the ability to communicate with the students. Hillsborough Community College is too large to expect the EDCs to manually keep track and successfully communicate with inquiries to the College. Currently, the EDCs cannot pull lists of applicants to contact and follow up with. Trying to keep track of inquiries is hit and miss, depending on the EDC – a system does not exist to communicate with inquiries or applicants. The Datatel Recruiter module needs to be implemented as quickly as possible to communicate with students. Implementation of the module will not only impact recruitment success, but will also improve job efficiency among the EDCs. And contact with the inquiries is key in successfully recruiting them. In a recent study at a community college in Oregon, when outreach personnel communicated regularly through email with the inquiries, the inquiries were four times more likely to follow through and enroll. The EDCs have to have the tools to communicate with the inquiries.

- Create a high school campaign that will elevate the student descriptions of the Hillsborough Community College student offered by the high school students in Hillsborough County.

The majority of the high school students described a student at Hillsborough Community College as a poor student (no money), academically unsuccessful student (low GPA),
undecided, and wanting to stay close to home. Target the high school students who were very good high school students, good athletes, academically successful (valedictorians), etc. that have chosen Hillsborough Community College over four-year college choices for each high school in Hillsborough County. Develop profiles of these students and run ads in the local high school newspapers, profile them on the home page of the college’s website, and develop posters of these students to be used in the college fair displays. Develop additional opportunities to promote these students with the high school market. An example of how to use the student profiles on the website is shown below for Temple University:

- Redesign the recruitment materials used at the college fairs in the service area.

Attending a college fair is just like being in a large exhibit hall – you just blend into the crowd unless there is something unique or special about the display. Everyone has a table and a backdrop or stand up posters. As one employee at Hillsborough Community College noted, “there is a sea of blue and we need to pop.” Hillsborough Community College needs to redesign the recruitment materials used at the college fairs, specifically a backdrop, table cover, and recruitment materials that are custom designed for the high school market. If possible, the display needs movement and video to draw attention. The College should also consider using tablets to capture inquiries rather than paper cards.
• Establish a high school advisory committee to provide input to Hillsborough Community College regarding high school messaging and to gauge the pulse of the high school students regarding information needed about college.

An excellent way to keep in touch with the high school students is to develop a high school advisory committee to work with Outreach and Marketing. The advisory committee should be a competitive process for students and the College should work with the counselors at the high schools to encourage the students to apply. One goal for the advisory committee will be for the high school students to provide feedback for the marketing materials created for the high school market. Another goal for the group is to provide information to the college about information needs of high school students about college. For example, the College should think about the advisory committee as a monthly focus group. Topics with the group can range from what they are looking for at a college fair, to evaluating a new viewbook, to what radio stations they are listening to and when. In addition, the simple fact that they are members of a Hillsborough Community College Advisory Committee sends an ambassador back into the high school with positive experiences with the College. The College should consider inviting juniors and allowing them to serve one year with at least one representative from each high school in the County. Offer incentives for serving on the committee.

• Market open houses at Hillsborough Community College via direct mail for high school students and their parents to explore the program opportunities at Hillsborough Community College.

A series of open houses need to be developed for the high school students and their parents to showcase the facilities and the benefits of attending Hillsborough Community College. Each campus needs to participate in the open houses – a date is picked and an open house is offered at each campus at the same time across the District. The open houses should be offered in the Fall semester. The information to be presented should include the program and transfer opportunities at Hillsborough Community College, paying for college, and being successful at college. Direct mail should be used to market the open houses with a purchased list, with media support. Faculty should be involved in outreach with these open houses.

MARKETING PROGRAMS

• Explore the development of a “one-year associate degree” aimed at the AP students and those taking college credit courses in high school.
A large number of the high school students are taking AP credit courses at their high schools, many of which are in subject areas considered as generals, or the basic liberal arts courses that students have to take. These students may be taking two or more classes a semester, and if they take the classes as juniors and seniors, they can accumulate up to 24 credit hours toward an associate degree by converting AP credits or transferring in the college credits. Hillsborough Community College should develop a prescriptive AA program for university transfer that will allow the high school students to attend for one year after high school graduation and complete an associate degree so that the students start as juniors. The program would have a very limited set of classes offered the Fall, Winter, Spring, and first Summer session to complete. Students who attend the program could look forward to a three-year bachelor’s degree, and even pay for the first year of a Master’s degree.

- Connect with high school students through extracurricular activities.

Hillsborough Community College needs to develop a list of all the clubs, organizations, and extracurricular activities at the main feeder high schools in the County. The College would then compare this list to the programming the College currently offers. The sponsors of the corresponding clubs and organizations at the College would be asked to approach the high school clubs and develop mentoring programs or sponsorships of the high school programs. The high school clubs and organizations would be invited to special events on the College’s campus. A music (vocal) department at a community college in the eastern United States actually held an American Idol type of competition for high school students. They pulled in judges, and put out a call for all high school students at the high schools in their area to participate. The winner actually recorded a music video produced by the College. The press was phenomenal and the community college immediately went to the top of the list for those who had some vocal talent but would not major in vocal. Utilize the events and activities that are most popular with the high school market.

- Explore the development of a Transfer Services Center at Hillsborough Community College to provide information and consulting to current and prospective students about four-year college transfer.

Currently, at Hillsborough Community College it is very difficult to find the transfer partners on the College’s website. If the student types in transfer in the search engine on the College’s website, and chooses the correct item in the list, information on transferring will be found. As seen in the screen print below, the AA degree is explained, but there is no mention of the colleges that the student can transfer to.
At the bottom of the page, the College does include a list of AA pre-majors. If Pre-Major is clicked on, the catalog page is shown.

If the Advising Guide for the Pre-Major is clicked, a list of the colleges to which the student can transfer is then shown on the bottom of the Advising Guide.
It is unlikely that a potential student will dig this deep into the information to find a list of the transfer colleges. The website should provide the colleges and the programs in an easy to see matrix.

Utilizing Kalamazoo Valley Community College as a model (see screen print below), the College should consider the development of a Transfer Services Center which offers assistance and information, and even advising, to the students who are considering attending Hillsborough Community College for their general education courses and then transferring to a four-year partner. The Center provides peer mentors, arranges visits to four-year campuses, conducts transfer workshops, and provides resources and assistance to help the student in a successful transition to the four-year partner.
When scrolling down the web page of Kalamazoo Valley Community College’s Transfer Resource Services, the colleges that the students can transfer to are clearly displayed (see screen print on the next page).

Links are provided for each of the colleges as well as contact information.
• Implement a customized e-brochure program to highlight programs at Hillsborough Community College, capture inquiries, and provide faculty inquiry information.

As seen in the research results, high school students are looking for information on programs, how to pay for college, and student life when they visit a college’s website. Hillsborough Community College should implement an e-brochure to allow students to create their own customized e-brochure which will allow them to get the information of interest easily, rather than searching the College’s website for information. By filling out the information section of the e-brochure, the inquiry is captured and can be followed up with. An example of a customizable e-brochure for the Community College of Philadelphia is shown on the next page.

The inquiry clicks on Request Information on the College’s website and is walked through a series of screens that allow the inquiry to choose the information for the program of interest and services, and provides contact information. After providing personal information, a personalized pdf is generated and opens, which provides information on what was requested as well as paying for college.
Establish dual admission programs with preferred partner four-year colleges and universities for Hillsborough Community College students.

For the students who are seeking a bachelor’s degree, it is important for Hillsborough Community College to provide opportunities with local four-year colleges for dual admission. The colleges that the current students at Hillsborough Community College transfer to are preferred as partners for dual admission agreements. Under a dual admission agreement, the student at Hillsborough Community College is a student at both Hillsborough Community College and the four-year college. The student is guaranteed admission to the four-year college after completion of the Associate degree at Hillsborough Community College. Bucks County College provides an excellent example of promoting a dual admission program on the College’s website (see next page).
Expand the summer class schedule to recruit more guest students.

When looking for increases in enrollments, the summer sessions present an opportunity to increase the available pool of under 25-year-old students by focusing on guest students – those local high school students who left the market to attend a four-year college or university and return home for summer. However, rather than waiting until the students return home for the summer, focus on getting information about the College’s summer session when the students need to make an informed decision. Typically, all students register for the Spring semester during the late Fall semester. Develop a direct mail piece containing the classes and descriptions, no schedule of times or instructors, that will be offered in the summer session at Hillsborough Community College and mail this to the households in the primary service area so that it arrives prior to Thanksgiving break. As the student is home for break, and discussing their classes for the Spring, the student can see what summer classes Hillsborough Community College will offer and can possibly lighten their Spring semester by substituting a summer class at Hillsborough Community College. Provide a landing page for the summer session and encourage the students to sign up for a list serve to keep them alerted to the class times as they are determined.
INFORMATION SOURCES

• Create a mascot for Hillsborough Community College to assist in marketing to middle school and high school students.

Middle school students are gaining information about College from counselors and teachers and high school students are beginning to get information about college even earlier today than they have in the past. It is important to be able to reach the middle school students with information about Hillsborough Community College and the best way to do that and create excitement is through the use of a College mascot. For example, Tarrant County College has Toro the Bull (above), which is used primarily in community outreach to youth audiences and on campus for student-centered initiatives.

• Create summer camps for the academically advanced middle school students to attend at Hillsborough Community College.

The more that the middle school students interact with the College, the more likely they are to attend the College in the future. Create “fun” academic camps for the STEM subject areas. Offer week-long camps that will explore areas of STEM – for example, a physics camp that will have fun activities exploring physics but challenge the students. Teachers can recommend high ability middle school students to participate in the camps. The College should provide the campus free of charge to the students. Middle school students still cannot drive and typically are not working in the summer. They make an excellent market for these types of activities.

• Increase the opportunities for high school students to visit the campuses.

A major source of information for the high school students about colleges to attend is their interaction with the colleges through high school by attending events at the campus. Hillsborough Community College needs to develop an inventory of all the events (competitions, open houses, career days, etc.) that are held at the College (on all campuses), and look for opportunities to increase the events which students can attend. For each event, plan it for all campuses so that it is consistently offered at the College.
• Create a parent direct mail campaign to increase awareness of Hillsborough Community College’s opportunities for high school students.

Hillsborough Community College has to increase knowledge about itself and its programs and services among high school students and their parents. The market for this direct mail campaign is the high school students (and parents) in Hillsborough County. First, purchase a list of high school students – one of the best sources is the American Student List (http://studentlist.com/listServ/database.asp). Next, develop a series of postcards that provide the students and the parents the information needed to move through the college choice process. For example, the Winter postcard may discuss this is the time for seniors to be applying for scholarships and filling out the FAFSA. The message is information and then a reminder that X students at Hillsborough Community College earn scholarships to pay for their first two years of college and the scholarship application deadline. The theme of an outstanding high school student choosing Hillsborough Community College should be used in these postcards.

The College should develop a schedule of multiple mailings each semester, focusing on the messages above. Oversized postcards have been the most effective medium for direct mail campaigns – the messages are seen, even if not attended to completely. There should be a call to action for each postcard: invitations to an open house, a financial aid session, join the College’s list serve for more information, request information on the website, etc.

WEBSITE
• Develop a high school landing page on the College’s website.

It is recommended that the College add a high school landing page that will focus on a single navigation to the information that is specifically needed by high school students. The landing pages can also provide the information that may be important to parents. The College would use a specific URL, like www.hccfl.edu/highschool. This URL can then be used to measure the results of the direct mail campaigns and other targeted recruitment activities, and ROI can be developed for the campaigns. The measures that can be used are initially changes in high school market share, and then begin adding visits to the landing page, prospects, applicants, etc. to the measurement pool.
Harper College provides an excellent example of maintaining their overall college brand by creating a unique school landing page targeted to the needs of the high school students. An example of Harper College’s high school landing page is shown above. Please note the easy-to-use navigation on the high school landing page that presents the information in “lay” terms. In addition, the live page utilizes video to make the page interesting and constantly changing. Finally, the call to action for the visitors is to schedule a campus visit, which can be scheduled easily online.

- Redesign the College’s website and provide interactive features of interest to the high school market.

The first stop when examining a college to attend is the college’s website. The website needs to be attractive, featuring young students prominently, and provide interactive features. Hillsborough Community College needs to redesign the College’s website (redesign underway at this time). The features that the College’s website needs include:
  - Online course catalog
  - Campus visit request form
  - Cost calculator
  - Virtual tour of each campus
- E-brochures
- Videos of students discussing why they choose Hillsborough Community College
HIGH SCHOOL COUNSELOR SCAN

Hillsborough Community College
Project Summary
KEY RESEARCH FINDINGS

Time and again, when surveys ask traditional age, first-time freshmen who had recommended or influenced their decision on where to attend college, a counselor or teacher usually is at the top of the list. The role of the high school counselors typically is that of a gatekeeper of information for the student. Counselors present information about attending college and why college is important, even in middle school and junior high. As students begin to think about college, and begin to get information, one of the first places they go is to the counselor’s office.

It is important to know and understand the attitudes of the high school counselors toward Hillsborough Community College (HCC), and to make sure that the high school students are able to access the information needed from the counselors. Focused, in-depth telephone interviews were conducted from April 19 to June 1 and then from August 8 to September 12, 2012, with high school counselors in 40 of the 48 high schools in Hillsborough County – 30 of the interviews were conducted with high school counselors in traditional high schools and 10 interviews were conducted with counselors in the career and technical high schools. Depending on the specific high school, the various counseling positions were interviewed: Head Counselor, College and Career Counselor, Counselor, Guidance Counselor, and Career Coach.

COUNSELORS’ EXPERIENCE WITH HILLSBOROUGH COMMUNITY COLLEGE

More frequent interaction between high school counselors and personnel at a community college generally equates to a better relationship. The first task was to assess the frequency and quality of the interaction between the high school counselors and the personnel at Hillsborough Community College. The high school counselors are most likely to interact with the College monthly (30 percent), but for half of the career and technical counselors, they only interact with Hillsborough Community College personnel twice a year. Overall, the interaction between the high school counselors and personnel at Hillsborough Community College is not frequent – the majority of the counselors interact with College personnel a few times a year and some never interact with College personnel. And for more than half (55 percent) of the high school counselors in Hillsborough County, they are the ones who initiate any interaction with College personnel, especially those at the career and technical high schools. Slightly more than one-fourth (26 percent) of the high school counselors in the County noted interaction was initiated by both them and personnel at the College – it was 50/50. The high school counselors were also asked to share the nature of their interactions with personnel at the College. For many, issues surrounding high school students’ dual enrollment was a major source of the interaction with College personnel, as well as obtaining information about admissions and programs at the College.

The two major forms of contact between the high school counselors and the personnel at Hillsborough Community College are email (76 percent) and telephone calls (60 percent). And
email is the method of contact preferred by three-fourths of the counselors (73 percent of the high school counselors and 80 percent of the career and technical counselors).

The high school counselors were asked if their interaction with Hillsborough Community College personnel was sufficient and the majority (71 percent) of the high school counselors noted the frequency of their interaction was sufficient. These counselors noted they get the information they need and for their jobs it is sufficient – as one noted “it works.” But 30 percent of the counselors would like more interaction with the College, and even for the majority of the high school counselors (69 percent) who noted their interactions were sufficient, they too would like more interaction with College personnel. Specifically, the counselors would like the College personnel to reach out to the high schools more – visit their school more often, talk to high school students, answer questions about enrollment, provide more face-to-face time to answer students’ questions, and provide more information about programs offered. The high school counselors would also like to get emails to let them know what is going on at the College. Several of the counselors noted that it is hard to speak to a person at Hillsborough Community College – they cannot get a person to talk to them and answer questions. They really need a direct contact person to assist them. But when the high school counselors do interact with Hillsborough Community College personnel, it is a good experience – the personnel at the College are given very good marks for quality of interaction. Thirty-four percent of the counselors rated their interactions with HCC personnel as excellent, 37 percent good, 10 percent average, three percent fair, 10 percent poor, and five percent do not know (never interacted with anyone at the College). For those counselors rating their interaction with HCC as poor, it is clear that it is both system and process issues at Hillsborough Community College that are impacting the counselors’ ratings for the quality of interaction.

DUAL ENROLLMENT PARTICIPATION
Participation in dual enrollment with Hillsborough Community College varies greatly by the type of high school. While 83 percent of the high schools have students participating in dual enrollment programs at Hillsborough Community College, only 20 percent of the career and technical high schools have students participating in the program. The 25 traditional high schools participating in dual enrollment represent 975 dual enrolled students, and there are 202 students in dual enrolled classes at the two career and technical high schools. The counselors who have students participating in dual enrollment noted there are major benefits for the high school students: college credit the high school students earn that can be transferred to the college of their choice, saves a lot of money for the students if they are attending a high-cost institution after high school graduation, and allows the students to experience taking classes in a college environment. A majority of the counselors (80 percent) agree that they have additional students who would benefit from participating in dual enrollment, but there are barriers to their participation.
Specifically, transportation (they cannot get to the College to take the classes since they are only offered at the College), some students may not be academically ready to participate and cannot meet the requirements for participation, and the paperwork and the process is confusing.

The counselors did suggest some ways that Hillsborough Community College could assist them in increasing dual enrollment at the high schools. The counselors suggested the College provide guest speakers about the topic, provide more information about the benefits to the high school students, offer tutoring for students to assist them in being eligible for classes, invite them to campus to experience the classes, and keep the counselors informed about the program.

EDUCATIONAL CHOICES

The number of students that today’s counselors are responsible for advising has exponentially increased in the last decade. The counselors were asked to share the number of students they are responsible for advising at their high school and the numbers ranged from 60 to 2,400 high school students. For the 30 high schools participating, the average advising load for a high school counselor is 912 high school students, and an average counselor in the 10 career and technical high schools is responsible for advising 296 high school students.

When asked to describe an average high school student who comes to the counselors seeking advice for plans after high school, one counselor noted, “It ranges from the very top to the very bottom; I get a range from definitely prepared and motivated to struggling.” At the top end, the counselors see high school students who are definitely college bound and constantly working with the counselors to get into their college of choice – they are focused, motivated, highly academic, parent-driven, and high achievers. At the other end, there are high school students who are unprepared and those that are looking for assistance in what choices they have after high school. The counselors also noted that the first-time in college group needs assistance with the process and procedures – they may be academically prepared, but they have not experienced the process and have no one at home to provide guidance. And the counselors also work with a group of students who are career oriented – they want to know how to quickly enter the workforce with the best possible options for jobs.

The counselors report that a majority of the high school students (62 percent) that the counselors work with are unsure about picking a college major. And almost all of the counselors (more than 90 percent) are providing advice about picking a major at college to these students. They are advising their high school students to take an interest inventory and explore what they like to do, and are good at, and then see what careers fit those attributes. The counselors also spend time discussing the high school students’ interests to help them begin to think about majors; the counselors send the students to colleges’ websites to examine their options and look at programs,
and they help them explore their personal strengths and weaknesses in the exploration for a major that will fit their interests.

The counselors report that a majority of the high school students in the region are looking at attending college – 79 percent plan to attend a four-year or two-year college after high school graduation – while five percent plan to enter the military, seven percent will attend a for-profit technical or trade school, nine percent will go directly into the workforce, and five percent will attend a HiTEC Center. The counselors at the traditional high schools estimate 37 percent will attend a four-year college, 44 percent will attend a two-year college, five percent will join the military, six percent will attend a for-profit technical, eight percent will enter the workforce, and three percent will attend a HiTEC Center. The counselors at the career and technical high schools estimate that 28 percent of their high school students will go on to a four-year college, 32 percent a two-year college, 14 percent will enter the workforce, eight percent will join the military, seven percent will attend a HiTEC Center, and seven percent a for-profit technical college.

Overall, 88 percent of the counselors noted Hillsborough Community College as one of the colleges in the top five colleges that their high school students will consider attending. The counselors noted that their students would choose to attend Hillsborough Community College because it is close to home (location), the cost (affordable), small classes, and they cannot get into a four-year college. Eighty-two percent of the counselors listed the University of South Florida as one of the top five colleges that their students would attend because it is a four-year college that is close to home (proximity). The University of Central Florida was mentioned as a top five college choice for the high school students by 42 percent of the counselors because it is close (location), the programs offered, and the tradition of attending. Florida State University was mentioned by 40 percent of the counselors as one of the top five colleges that the high school students would be likely to attend and was considered the most prestigious of the colleges mentioned – they would attend because of the academics, history, family tradition, prestige, top school, tradition, and legacies. And 35 percent of the counselors mentioned the University of Florida as a college that their high school students would be likely to attend because of family, prestige, outstanding college, and sports (specifically football).
INFORMATION SOURCES

A national trend occurring is that the high school students are seeking information about college earlier today than they have in the past decade, thanks to changes in the high schools and the availability of information online. More than one-third of the counselors report that their high school students are following the national trend. The high school students are less likely to wait until their junior year to seek information as high school students in the past have. Overall, 10 percent of the students started seeking information about college in grade 8 or earlier, 12 percent as freshmen (in grade 9), and 15 percent as sophomores (in grade 10). The counselors reported that 52 percent are still waiting until their junior year (11th grade) to seek information about college and 10 percent are doing it as seniors (12th grade). The high school students are seeking information about how to pay for college, with the majority asking for the costs, information about financial aid, the FAFSA, and scholarships, as well as information about majors and programs offered, admission requirements, test scores, the financial aid process, the grades or GPA needed for colleges of interest, scholarships available, and when to apply to colleges.

The counselors offered opinions on what would be the best ways to communicate with today’s high school students, and in today’s highly technical world, it appears that low tech solutions may still be the best. The counselors believe that visits to the high school (67 percent) and the guidance counselor (62 percent) are still the best way to reach high school students with information, over many of the technology based solutions. Forty-five percent of the counselors reported special events at the College are the best way to get information to students about Hillsborough Community College, while 42 percent said to use Facebook or social media. Only 28 percent of the counselors said using emails and direct mail would be the way to get information to high school students today, and even fewer noted the use of text messaging, phone calls to cell phones or home phones, online chat, and instant messaging would be effective in reaching the high school students. But examining the other methods of contacting the high school students offered by the high school counselors, interacting with the College is predominant in their suggestions. Their suggestions included: application day (HCC comes to help them apply), come test them, career fairs, complementary programs with us (Parent Night, tutoring), conferences twice a year, field trip to College, information night or field trip, speak to GED class, special events at Hillsborough Community College, tours, and arrange for a group to come to Hillsborough Community College.

According to 80 percent of the high school counselors, their students are using colleges’ websites to gather information about colleges. Twelve percent of the counselors did not know whether the high school students were using colleges’ websites, and seven percent of the counselors said their students are not. Of the information the high school students are seeking from the colleges’ websites, information about programs and paying was predominant – majors (50 percent), costs
(47 percent), financial aid (47 percent), admission requirements (45 percent), and the application (42 percent). The high school students are less likely to be searching for information on scholarships (23 percent), housing (19 percent), GPA requirements (19 percent), college location (12 percent), and sports (six percent). None of the students are seeking information on study abroad programs and ratings of the college according to the counselors. Half of the counselors mentioned other information the students were seeking, including advisors, articulation agreements, career interest surveys, extracurricular activities, opportunities, orientation, size and facts, and which campus offers which majors.

And the high school counselors are using colleges’ websites to gain information – 98 percent of the high school counselors have tried to get information from Hillsborough Community College’s website. Thirty-six percent of the counselors noted the most valuable information on Hillsborough Community College’s website is dual enrollment, while others noted it was information on the application process, admission requirements, courses, calendar, majors/programs, contacts, and testing. Overall, 23 percent of the counselors rated the website as very easy to use, 36 percent easy, 20 percent somewhat easy, and 20 percent said the site was not at all easy to use. The high school counselors actually reported a lower level of ease of use than the career and technical guidance counselors – 27 percent of the high school guidance counselors noted the College’s website was somewhat easy to use and 17 percent noted it was not at all easy to use, while 33 percent of the career and technical counselors noted it was not at all easy to use. The counselors who had difficulties on the College’s website and reported it was not at all easy to use said information was hard to find and it was not easy to navigate the site.

Several years ago, Hillsborough Community College created a web page on the College’s website specifically for the high school counselors to provide them with the information needed. But based on the survey results, the majority of the guidance counselors do not even know that it exists or where to find it. While the College did a good job creating it, they did not do a good job in communicating the web page to potential users. Overall, 56 percent of the counselors do not even know the web page exists. One-fourth of the counselors in the service area have used the page, 18 percent know the page exists but have not used it because they do not have the time, like to call when they need information, and have all the information anyway. For the 26 percent of the counselors who have used the web page, the information they found most valuable on it includes deadlines/dates, dual enrollment, entrance requirements, financial aid, test scores, programs, and reminders for in-state residency on application.
PERCEPTIONS OF HILLSBOROUGH COMMUNITY COLLEGE
Interacting with high school students and their parents provides the counselors insight into the families’ perceptions and attitudes about Hillsborough Community College. Eighty-five percent of the counselors have discussed college information with the parents of their high school students. Typically, the counselors interact with the high school students’ parents at meetings which can be individual one-on-one contacts or in groups, as well as phone calls and emails with parents. The counselors noted that any time the parents want to visit, they make themselves available. The counselors are also likely to interact with the parents during college nights, junior nights, and senior nights at the high school. The key information that the parents are seeking when they meet with them are: cost (“How am I going to pay for this?”) and admissions (“Can my child get in and what do they need to get in?”). After understanding the cost of the colleges of interest, the next major concern for parents is to make sure that their children can get into the college of their choice. Issues that parents generally discuss with the counselors include admission requirements, testing requirements, GPA needed, test scores needed, etc. And as would be expected, the counselors reported that the parents held both positive and negative perceptions of Hillsborough Community College. As one counselor noted, perceptions of Hillsborough Community College “depends on the child – where the child is academically – and depends on parents – their finances.” The counselors reported that many of the parents viewed Hillsborough Community College positively and noted: it is great, hope their child goes there, just glad kid is going somewhere, surprised by what Hillsborough Community College has to offer, like the cost, it is accessible, and offers very good opportunities. But not all parents were positive about Hillsborough Community College and the perceptions of those parents as reported by the counselors show it as a college not for their kids: 13th grade, enrolls students who cannot make it at a four-year, good alternative but not as good as four-year, default college, students should go to a four-year, it is not a real college, last resort, boom-boom school, and their kid worked too hard to go to Hillsborough Community College. The counselors reported that some of the parents had heard negative things: issues about enrolling at Hillsborough Community College, specifically about the college losing students’ transcripts, heard stories about long lines, having to wait a long time to be seen, and experiencing problems with enrolling for dual enrollment.

Since not all parents have a positive image of Hillsborough Community College, the counselors were asked what messages the College needed to give to the parents about why Hillsborough Community College would be a good choice for their children. The key messages suggested by the counselors that the College needs to reinforce to parents include tell them about the cost, the AA and transfer, market it as a real college, and emphasize the smaller classes and interaction with instructors.
The counselors were asked to summarize, from their perspective, the image of Hillsborough Community College with the students at their high school, and both positive and negative images are held, as with the parents. A majority of the counselors noted their students had a positive image of Hillsborough Community College – a good place to start, next step, better fit, only choice, and second step. But not all the high school students’ perceptions of Hillsborough Community College were positive – many view the College as a 13th grade or an extension of high school, as a backup college or a second choice, and others view the College as scary – they are unsure of the process, students trying to apply and enroll cannot get information, and their questions are not answered.

ASSISTANCE NEEDED BY COUNSELORS
All of the counselors interviewed encourage their high school students to attend Hillsborough Community College, and for more than half (55 percent), the typical goals of the students they encourage to attend Hillsborough Community College are for an associate (AA) degree and then transfer to a four-year college to complete a bachelor’s degree. The balance of the goals for the students the counselors encourage to attend Hillsborough Community College is for those interested in employment options, specifically: for career tech programs, to get training for a job to earn money, a trade, for technical skills, and for nursing. Finally, those who are undecided are also encouraged to attend Hillsborough Community College to explore options.

The majority of the high school counselors (58 percent) agreed they do get enough information to advise their students, but 42 percent of the counselors noted they do not get enough information to advise their students on Hillsborough Community College’s programs. The counselors indicated a need for program information in four areas: AA/ AS degree requirements (courses needed), admission information to include information on test scores, orientation, applying, and the application process, handouts to give to students because they have not received any written material in a long time, and programs offered by the College. One counselor noted that the College needs to develop detailed program information that “could be read by laymen.”

The counselors were asked to compare the materials they received from Hillsborough Community College with the materials they receive from other colleges and universities, and 30 percent of the counselors reported they get less information from Hillsborough Community College than the other colleges – they noted Hillsborough Community College’s information is worse, they get no information at all, have to ask for materials, it is less extensive, and other colleges send a monthly email. Thirty-five percent of the counselors noted the information from Hillsborough Community College was comparable to the information they receive from other colleges. Only 10 percent of the counselors noted the information the College sends is actually better and more than the other colleges in the market; specifically the annual workshop at Hillsborough Community
College, the pamphlets are better (colorful and appealing), and the universities just refer them to the website and provide no materials.

Unfortunately, 70 percent of the high school counselors noted that their students do encounter barriers when trying to attend Hillsborough Community College. The major barrier noted by the counselors was the application process, and two of the counselors noted “the students get frustrated when they go on campus – there is not much help there” and that there is “intimidation on getting info from Hillsborough Community College.” Other barriers to attending HCC included lost transcripts, classes filling up so students cannot build a schedule, transportation, and cost.

The final question posed to the counselors was “What can Hillsborough Community College do to assist you and your students?” And the answers were as varied as the counselors and the students they are serving. Overall, the key theme running through the counselors’ responses was better communications – from Hillsborough Community College to the counselors and the high school students. Another major suggestion for Hillsborough Community College was to make the College’s website and the phone system at the College more user-friendly. Counselors gave numerous examples of having issues when trying to reach college personnel through the College’s phone system. Overall, the counselors prefer that personnel at Hillsborough Community College visit them more often – meeting with the counselors and students. And finally, the counselors would like to have a contact person assigned to them at the College so they know who to contact, can do so directly, and can get an immediate response to any issues or questions.
ISSUES TO ADDRESS

After examining the details of the in-depth focused telephone interviews with guidance counselors and visiting with staff at Hillsborough Community College who interact with the high schools, the following recommendations are made for the College to consider with respect to marketing to the high school guidance counselors.

INTERACTION WITH THE COLLEGE

• Increase the interaction with the high school counselors and students in the high schools and provide a point of contact for the high school students and counselors.

The high schools are an extremely important feed of first-time, full-time students into Hillsborough Community College. The Enrollment Development Coordinators (EDCs) need to be the primary contacts for the high schools in Hillsborough County, and a majority of the time for the EDCs should be spent in collaboration with high school counselors and high school students. The EDCs should be the main point of contact for the high school counselors – the personnel at HCC that can answer any question and is always available by phone and email. The EDCs should visit the high schools monthly. The contact information for the EDCs should be provided on the Guidance Counselor page on the HCC website and they should be introduced as the personal contact for the high school counselors.

To improve communication with the high school counselors, a newsletter should be developed for high school counselors and sent to them at the beginning of each semester with the pertinent dates for enrolling. Included in this newsletter should be any updates and key information regarding application and admissions – changes to the HCC system, etc. Marketing should work with Admissions to develop the newsletter. In addition, a monthly email should be created, with Marketing collaborating with Admissions to develop a branded template, for the EDCs to send monthly updates. The monthly update would be the same for all campuses and written by Admissions, but would be sent from the emails of the EDCs to reinforce the contact with their College representative.

Finally, as the College moves to centralize the applicant processing at the District office, a “High School Counselor” hotline number should be developed that would ring into the applicant processing center. This would provide the high school counselors immediate assistance with the issues they are facing with the high school students regarding applications and enrollment. There should also be a representative available in the
applicant processing center to assist the high school counselors with questions about dual enrollment.

INFORMATION SOURCES

- Develop materials that clearly delineate the paths for high school students at Hillsborough Community College and support their career exploration and career inventory needs.

The high school counselors, regardless of the type of high school affiliation, noted that there are three very unique groups of high school students that are a market for Hillsborough Community College based on educational goals: (1) the high school students that are interested in pursuing a bachelor’s degree and could attend the College to get an AA and then transfer to a four-year college or university, (2) the high school students who are interested in employment options (career tech programs), and (3) those who are undecided about college in general and could explore options at Hillsborough Community College. The College needs to develop three very distinct marketing pieces for each of these groups – high-energy pieces that focus on high school students – and the college paths outlined. Since the educational objectives of these students are so diverse – a bachelor’s degree versus immediate employment – one high school viewbook will not suffice.

The viewbook focusing on transfer needs to promote the benefits of transfer programming and the colleges that the students can easily transfer to in the area. The College also needs to clean up the articulation agreements with the University of South Florida, the University of Florida, and other area colleges and make sure that the high school guidance counselors have easy access to the agreements on the College’s website so they can advise students.

The viewbook for those students who are interested in immediate employment should focus on the associate degrees that a student can earn and gain immediate employment. Success stories for students need to be presented in each of the brochures.

Finally, a third viewbook needs to be developed that focuses on the students who are unsure about college, and unsure about what they want to do. The viewbook needs to focus on the services available at Hillsborough Community College that would allow the student to explore career paths – like job interest inventories, career consulting, etc. Finally, Hillsborough Community College should explore the feasibility for implementing Career Coach and making it available to all high school students and counselors in the County. This would be an excellent tool to market to the high school counselors and they could send those students to the website to utilize Career Coach in addition to individually
consulting with the high school students. The College would then become a recognized source for assistance.

- Promote Hillsborough Community College’s High School Counselor page as the first point of contact for information for the high school counselors.

Continually update the information on Hillsborough Community College’s High School Counselor web page to provide the most current information on dates and deadlines for the high school counselors. Also develop one page information sheets that the counselors can easily print off and share with high school students on residency, the application checklist, etc. Create giveaways for the high school counselors, possibly mouse pads or another item that would be kept near their office computer, with the URL of Hillsborough Community College’s High School Counselor page. The EDCs should hand-deliver these giveaways to the high school counselors.

MARKETING

- Increase the opportunities for the high school students to visit the College for activities, events, career days, etc.

The high school guidance counselors underscored a finding in the High School Scan – the more the high school students interact with the College, the greater the likelihood that the students will consider enrolling at the College. The College should develop a schedule of events that the high school students can attend at the College – events that are college-wide and offered at each of the campuses at the same time and date. The types of events that the College should consider implementing are career days for specific career areas, how to apply to college events, career exploration events, and others.
KEY RESEARCH FINDINGS
The employers in Hillsborough County are a key market for Hillsborough Community College. The College provides training for their employees, it relies on the employers to provide insight into industry trends that impact curriculum, and the employers provide jobs for the graduates of the College. In an effort to understand the needs of the employers in Hillsborough County, a survey of employers was conducted to assess:

- Whether there is currently a qualified workforce in Hillsborough County and the skill sets which may be missing from current job candidates
- The future employee needs of the employers in the region
- The current and future training needs of the employers and preferences for delivery of that training
- Employers’ support for education for their current employees
- Current usage of Hillsborough Community College
- Opportunities for partnerships between Hillsborough Community College and the employers in the County

Telephone and personal interviews were conducted with a sample of 400 employers in Hillsborough County from September 18 to November 20, 2012. The 400 employers represented 83,196 employees in Hillsborough County. Thirty-seven percent of the employers indicated interest in being contacted by Hillsborough Community College about their training needs and 57 percent would like a summarized copy of the survey results. This provides an excellent opportunity for the College to follow up with the employers.

QUALIFIED WORKFORCE
Overall, 44 percent of the employers noted there is a current shortage of qualified job candidates in Hillsborough County, and the primary reason for the shortage is missing skill sets in applicants. Thirty-eight percent of the employers noted that the current job candidates are missing a work ethic (showing up on time, showing up at all, and providing a full day’s work) and 36 percent noted the applicants were missing professionalism (how you dress, your attitude, and how you interact with others). Thirty-three percent of the employers noted that the current applicants are missing critical thinking skills, 29 percent are missing technical skills, and 21 percent are missing basic skills, primarily mathematics. And more seriously, for some employers, is the inability of the applicants to pass background checks (24 percent) and drug tests (18 percent).

Almost one-third of the employers also believe that there will be a shortage of job candidates in the next three to five years. Because of the poor economy, in the past three to five years, the employers have had overqualified applicants for many positions but as the economy improves, the
employers believe that the applicant pool will start to reduce and it will be harder to find qualified applicants. In addition, employers are seeing more job candidates with less education and no experience in the job market and this will make it more difficult for the employers to find qualified candidates, while some of the employers note that the E-Verify immigration laws will also make it more difficult for them to find qualified job candidates.

FUTURE EMPLOYEE NEEDS

Ninety percent of the employers surveyed in Hillsborough County plan to hire employees in the next 24 months. The 400 employers noted a need for employees to fill 10,713 jobs in the next six to 24 months, the majority of which will be due to turnover. However, 43 percent of the job openings will require no education and 24 percent will only require a high school degree or GED. Twenty-three percent of the job openings will require a bachelor’s degree and the majority of these positions will be due to job growth. The job openings in which bachelor’s degrees will be required in the next two years include education – teachers (50 percent), engineers, nurses, occupational therapists, medical assistants, reservation coordinators, store managers, and information technology specialists.

Only two percent of the jobs forecasted for the next two years will require associate degrees. The primary occupations requiring associate degrees include nursing and medical specialties, such as occupational therapy assistants, physical therapy assistants, speech therapy assistants, and surgical technicians, as well as sales, administrative support, clerical, legal secretary, paralegal, receptionists, engineers for software, and information technology. Four percent of the occupations needed will require certifications, and one percent or less a technical certificate, a Master’s degree, or a professional degree.

Currently, 36 percent of the employers reported that for more than half of their occupations, an advanced degree or a certification is required for employees. Sixty-one percent of the employers requiring advanced degrees noted a bachelor’s degree is required and 60 percent require certifications. Employers were also asked if their current workforce needed to seek college degrees to raise the educational levels of their current employees. While only 21 percent of the employers noted degrees were needed for their current employees, the majority indicated a need for bachelor’s degrees (72 percent) and associate degrees (52 percent), with 42 percent indicating a need for Master’s degrees and 15 percent doctoral degrees, and the primary subject area needed is business.
TRAINING NEEDS
The good news is that employers in Hillsborough County are providing training to their employees – 93 percent of the employers provided training to their employees in the last year. But 88 percent of the employers provided that training in-house and did not contract out their training needs, limiting the opportunity for the College to provide training for employers in the County. The primary training provided by the employers in the last year included: safety, customer service, sales, management, CPR, first aid, OSHA, software, leadership, forklift, server training, new hire training, computers, housekeeping, supervisory, harassment, diversity, and orientation. The majority of the employers also plan to provide training to their employees in the next year, focusing on customer service (64 percent), leadership (63 percent), and management and supervision (62 percent). Slightly more than half of the employers also plan to provide training for their employees in conflict resolution (53 percent), computers (54 percent), diversity (53 percent), and sales (53 percent). In addition, the employers will also provide training to their employees in the next year in the areas that are mandated, such as safety.

Employers are most likely to provide the training using in-house and corporate resources, not outside vendors such as Hillsborough Community College. But employers were asked if they did contract out for training, how they would want that training delivered. Forty-eight percent of the employers prefer the training to be delivered at their place of business, Monday to Friday from 8am to 5pm (95 percent). While employers still prefer hands-on training (especially for things like forklift training), 66 percent of employers will utilize employee self-directed training – online and videos – as well as online training (65 percent). The training market has moved to online delivery – employers can train at the time and place of their choosing, and not have to shut down an entire line or remove all employees from a floor, while ensuring that each person will get exactly the same material when the training is delivered.

Fifty-two percent of the employers also noted that they have employees that have to obtain continuing education units to maintain licenses. The need for continuing education units cuts across industries, with needs for CEUs in medical, legal, engineering, management, real estate, and insurance industries.

EDUCATIONAL SUPPORT FOR EMPLOYEES
Employers are likely to allow employees to work flexible schedules to attend college classes, but fewer of the employers are willing to pay for the employees’ education. Seventy-two percent of the employers will allow employees to work a flexible schedule around college classes, but only 47 percent will provide tuition reimbursement for credit classes and 22 percent will pay for books for the classes. While there has been a decline in the willingness of employers to pay for college classes, more are paying for certifications and testing (45 percent) and CEUs (37 percent). Only 26
percent of the employers will pay for noncredit training classes, eight percent will provide paid release time to attend classes, and five percent offer colleges classes on-site for employees.

But even with a reduction in employer support for education, employees are seeking education. Sixty-five percent of the employers surveyed noted they have employees currently attending college – with 45 percent enrolled in online classes. And the majority of those employees attending classes are going to Hillsborough Community College (46 percent) with 24 percent attending the University of South Florida.

USAGE OF HCC
Overall usage of Hillsborough Community College by the employers in the County is low – employers either have no need to use the College (their perception) or are simply not aware that the College can assist them. Nine percent of the employers surveyed have sent employees to classes at Hillsborough Community College (81 percent paid for them), and five percent have used the College to train employees. While usage is low, satisfaction is high – 97 percent of the employers who sent employees to classes and all of those who used the College for training are satisfied with the programming offered by the College. The key is to increase the awareness of the services and programs offered by the College. Eighteen percent of the employers noted they are likely or very likely to consider using the College for training in the future and 24 percent noted they would consider it (depending on the classes, cost, and offerings).

Thirty-five percent of the employers have also hired graduates of Hillsborough Community College and again the College’s performance is good – 42 percent rate the graduates as excellent and 32 percent good, with only three percent rated as fair and one percent poor. For the employers who have not hired graduates, at one end of the spectrum, they noted that a degree was not necessary for their occupations and at the other end all they hired was bachelor’s degrees.

PARTNERSHIP OPPORTUNITIES
Employers would consider collaborating with Hillsborough Community College to develop a needed degree or training program, but not in large numbers and not if money is needed. Overall, 23 percent of the employers will pay employee tuition for a training program or a degree needed for their employers if Hillsborough Community College would develop the program and 22 percent will participate in that development by giving time to serve on a committee to guide development. Eighteen percent of the employers will provide a site for classes or lab space, 16 percent will pay contract fees for instruction for a program, and 15 percent will participate in the development of a customized workforce-training program. Only seven percent of the employers will provide start-up program funding and six percent will loan or purchase equipment for a new program.
ISSUES TO ADDRESS

After evaluating the results of the surveys with employers, the interviews with the economic development representatives, and the jobs forecasts for the nation, state, and region, the following represents key issues that Hillsborough Community College should examine with respect to programming.

- Create a bi-annual magazine focusing on a specific industry in Hillsborough County to illustrate the myriad programs and services available at the College for employers.

Although the employers are aware of Hillsborough Community College, they do not understand all the ways that the College can assist them in employee training and corporate consulting, as well as providing educational opportunities for their employees to raise their educational levels. The Marketing Department at the College should develop a high-end magazine for the College that will focus on a specific industry in the County. The focus of the magazine will be to illustrate all the ways that Hillsborough Community College is working with employers and employees in that industry. For example, if the magazine’s focus was health care, the feature stories would include:

- Academic Program Highlight: Showcase individuals who have returned to the College and completed a degree in nursing or another unique medical field offered by the College and how they are working in the community now helping others and achieving their dream
- Corporate Training Highlight: Showcase employers that the College has developed a contract training program in the medical industry and the results of the training for the employers
- Certification Highlight: Provide examples of individuals who have gained additional certifications at the College and how they are using it to provide cutting-edge or innovative services to individuals in the community
- Continuing Education: Share examples of how the College is providing “cutting-edge” delivery of continuing education to individuals in the County and how they are using that knowledge to provide services to the community

These targeted areas should help employers and constituents alike understand more about the overall scope of services that the College offers. The magazine should also adhere to the brand platform and embody “The Power of Community.” The target audience would be the employers and other key constituent groups in Hillsborough County. An example of a similar brand-centric publication of this type is the “Pathways” magazine produced by the Community College of Philadelphia.
• Redesign the College’s website for the “Institute for Corporate and Continuing Education” into two different websites – one aimed at employers and the other at employees and individuals.

There are at least three distinct markets for Hillsborough Community College’s Institute for Corporate and Continuing Education: (1) employers who want customized training for employees delivered on-site or a training program that can be delivered to their employees; (2) employees looking to upgrade skills or attain certifications; and (3) individuals in the market interested in more recreation classes (for personal enrichment, for children or grandchildren). The current website tends to mix programming for all of these markets and it is not easy to navigate and find programming that may interest each group easily. For example, in the screen print on the next page, an employer may be looking for a webinar in a specific area for employees and in the left navigation, wine tasting is listed. It is likely that an individual may be looking for wine tasting, not an employer.
The website for the Community College of Allegheny County provides an example of splitting the content and aiming at the audiences the content that has direct applicability. In the screen print shown on the next page (the College’s home page), in the left navigation there are links to “Center for Professional Development” and “Community Education,” which splits the content aimed at the workforce from the content aimed at the personal enrichment market.
By more clearly defining audiences, and then aiming the content, it will be easier for the audiences to navigate the site and find topics of interest.
• Explore development of several webinar series to market to employers in the County.

Delivery methods for training have changed significantly in the last decade due to improvements in technology and tighter budgets, and Hillsborough Community College will need to continue to adapt their delivery methods to stay a primary provider for the employers in the service area. The employers in the County plan to provide training to their employees in the next year in customer service, leadership, management/supervision, conflict resolution, computers, diversity, and sales. And the majority prefers to have training delivered online. The College has a great reputation with employers for providing training, but with tight budgets, many employers are providing training in-house to their employees, not providing training, or utilizing the $99 per year online training videos and webinars. To remain a market leader in training, Hillsborough Community College should expand their webinars in these areas and create a series for each area. Webinars provide an opportunity for interaction that online videos do not. The “Webinar Series” should be promoted through direct mail to the employers, with a corresponding landing page on the College’s website, allowing for easy registration and encouraging employers to sign up for the “Employer” list serve which will provide the employers frequent updates about all training opportunities offered at the College.

• Position Hillsborough Community College as a “Think Tank” leader to bring together IT personnel from multiple industries to examine employer needs for the future and create a Center of Excellence in Information Technology.

After discussions with the economic development representatives in the region, information technology jobs are a key focus for the future as the region expands and attracts new companies. Hillsborough Community College needs to position itself as a leader in information technology in the market. First, the College should meet with industry leaders to define the needs for the County. The College should develop a cross-industry task force, bringing together IT representatives from major industries to discuss their employment needs for the future. This could be a day-long event hosted by the College, with a national keynote speaker to set the stage for the needs for information technology in the future. The group would then split into small work groups to more clearly articulate their IT needs and personnel from the College could moderate the smaller groups. Then the College should review the current curriculum in Information Technology at the College to ensure that the programming is meeting the employment needs of the employers in the service area. In addition, many of the employers noted a lack of computer skills in current applicants as well as the need for training current and new employees in
computer skills. The College should explore a computer requirement for all graduates that goes beyond simple literacy and provides a graduate with full usage of Microsoft Office.

- Explore the feasibility of offering post-bachelor’s degree certifications to adults in the service area.

Certifications add value to employees – for both the employer and the employee. Many industries are developing certifications that require participants to have bachelor’s degrees and experience in the field prior to working through the curriculum for the certification. An example is the Fraud Examiner Certification, which is a post-bachelor’s degree certificate. A program would be developed that would prepare the student, who has completed a bachelor’s degree in accounting, for the test for the Certified Fraud Examiner license. Hillsborough Community College should explore key certifications in health care and business to start the programming.
ADULT MARKET SEGMENTS

To clearly define the market segments at Hillsborough Community College, it is important to examine the enrollments at the College by age. The age of the student directly impacts the marketing efforts that have to be developed to successfully attract students to the College, and each age group is affected by generational characteristics that will impact how the potential students will react to messages from the College, interact with the College, and form their expectations of programs and services. Generationally, there are four segments that are potential students for Hillsborough Community College – Generation Y, Generation X, Baby Boomers, and Matures. Generation Y is defined as those students roughly 16 to 24 years of age – recent high school graduates and younger adults who are the most likely to attend college. This market was examined in the High School Scan Report presented by CLARUS Corporation. This report will focus on the adult segment – Generation X, the Baby Boomers, and the Matures.

Generation X is the most cynical generation. This generation was the first generation of “latchkey” kids – kids who came home to empty households after school – and this was the first generation in which children were exposed to frequent daycare and divorce. Today, Generation Xers are between 25 and 44 years of age. Generation X has the lowest voting participation rate of any generation. The adults in Generation X are characterized by high levels of skepticism, “what’s in it for me” attitudes, and a reputation for some of the worst music to ever gain popularity. As Generation X moves into adulthood, the sole focus is on family – spending time with spouses and children. The divorces experienced when they were children have impacted the adults in Generation X – it has shaped how they spend time with their families and their “family first” attitudes. The adults in Generation X are also the best educated in history. But the cynicism of Generation X carries through to purchases – consumer transactions have to happen quickly and the best bargains are shopped for electronically. From this Generation came websites like Travelocity, which offers the best and lowest price electronically with no haggling.

Some say Baby Boomers run the world, especially the Baby Boomers. This generation is typically defined as adults between the ages of 45 and early 60’s. A single, defining historical event of the Baby Boomer Generation was the Vietnam War. Baby Boomers, even as they age, continue to fight against injustice – they are responsible for the women’s movement, the civil rights movement, Vietnam War protests, and much more. But one thing culturally unites the Boomers like no other: television. The Baby Boomers were the first generation raised on TV. They could share cultural events and milestones with everyone, no matter where they were geographically. They all watched “Bonanza” or “Leave it to Beaver,” and saw the Vietnam War in their living rooms while they were coming of age. Rock and Roll also gave this generation their identity and they still listen to classic rock today. But Baby Boomers put their trust in themselves. They got married later, had kids later, and spent lavishly on themselves because they could. The Baby Boomers worked hard to get
ahead – educationally, financially, and personally. As they moved up the corporate ladder, they moved up to larger homes and more expensive cars. As they age, they do not want to be reminded of it and will spend for products to keep them young. And they never plan to retire – even if they retire from a successful career, they will attend college to start another career. The Baby Boomers are true lifelong learners.

The Mature Generation – also known as Veterans, the Silent Generation, and the Greatest Generation – is comprised of adults who are over 60 years of age. These older Americans hold three-quarters of the nation’s wealth and are the executive leaders of some of the most established and influential companies in America. The Mature Generation not only survived the Great Depression of the 1930’s but was instrumental in shaping the United States as an economic and military power. Patriotism, teamwork, “doing more with less,” and task-orientation very much define this generation. Rules of conduct, respect for authority, and following directions are all very important touch points for this generation. The Mature Generation boasted the first true innovators. The adults in this generation are responsible for putting a man on the moon; creating vaccines for many diseases including polio, tuberculosis, tetanus, and whooping cough; and laying the foundation for today’s technological innovations. This Generation moved from farms and cities to a new kind of community – suburbia. And this Generation is frugal – the older adults will argue over a 10 cent difference in their light bills – and since they grew up with shortages, they are likely to hoard household materials.

![Diagram showing enrollment at Hillsborough Community College, Fall 2008 and 2011]

**Segment Percent Of Enrollment At Hillsborough Community College,**
**Fall 2008 And 2011**

- **Fall 2008:**
  - Unknown: 0.1%
  - 61 & Older: 0.2%
  - 45-60: 3.9%
  - 40-54: 7.3%
  - 35-44: 17.1%
  - 25-34: 30.3%
  - 20-24: 26.3%
  - 19 & Younger: 12.5%
  - Non-Credit Clock Hour: 2.3%
  - Dual Enrollment: 0.1%

- **Fall 2011:**
  - Unknown: 0.7%
  - 61 & Older: 0.3%
  - 45-60: 4.6%
  - 40-54: 8.6%
  - 35-44: 21%
  - 25-34: 31.3%
  - 20-24: 23.1%
  - 19 & Younger: 6.6%
  - Non-Credit Clock Hour: 3.7%
  - Dual Enrollment: 0.7%
So which of the generations is Hillsborough Community College successfully enrolling? As seen in the chart on the previous page, Hillsborough Community College has been most successful with Generation Y – the recent high school enrollees. In Fall 2011, 54.4 percent of the enrollees at Hillsborough Community College were Generation Y, a slight drop from Fall 2008 where 56.6 percent were Generation Y. Overall, in Fall 2011, 23.1 percent of the enrollees were 19 years of age and younger, 31.3 percent were 20 to 24 years of age, and slightly less than four percent were high school students enrolled in college classes (dual enrolled).

The remainder of the enrollees at Hillsborough Community College in Fall 2011 comprise the adult generations – almost 30 percent are in Generation X, five percent are Baby Boomers, and less than one percent are Matures. Generation X is comprised of two age groups – 25 to 34 and 35 to 44. From Fall 2008 to Fall 2011, the percent of adults enrolling at the College in Generation X has increased. In Fall 2008, 17 percent of the adult enrollees were 25 to 34 years of age and seven percent were 35 to 44 years of age. By Fall 2011, 21 percent of the enrollees were 25 to 34 and nine percent were 35 to 44 years of age. In Fall 2011, five percent of the enrollees were Baby Boomers (ages 45 to 60). Less than one percent of the adults in Fall 2011 enrolling at the College were 61 years of age and older (the Matures). The ages of the non-credit clock hour students are unknown, but they are purported to be adults and they comprise only seven percent of the total enrollment at the College in Fall 2011.

When evaluating the adult market, three adult age groups are examined: the younger Generation X (25 to 34 years old), the older Generation X (35 to 44 years old), and the Baby Boomers (45 to 60 years old).
As seen in the chart on the previous page, all of the adult market segments have seen growth in enrollments at Hillsborough Community College, especially among the full-time students, from Fall 2008 to Fall 2011. From Fall 2008 to Fall 2011, the number of full-time younger Generation Xers (25 to 34) increased 76 percent and the part-time enrollees increased 23 percent. And this group accounts for one-fifth of the enrollments at the College. Major increases were seen for the full-time older Generation Xers (35 to 44) and the Baby Boomers – the enrollment from Fall 2008 to 2011 for the older Generation Xers increased 89 percent and for the Baby Boomers enrollments increased 128 percent. The part-time enrollments among these adult segments also increased during this time frame – 16 percent for the older Generation Xers and 17 percent for the Baby Boomers. But these two groups only accounted for 13 percent in Fall 2011.

For Hillsborough Community College to continue to have a robust enrollment among the adults in the community, two things are needed: high brand equity and an understanding of the adults’ educational needs. The key question for Hillsborough Community College in the adult market is how to increase enrollments among the adult segments and entice more adults to consider attending college. In order to accomplish that, the College needs to understand its current market position among the adult students, the profile of the adults interested in seeking education or training, and how best to reach those adults. To provide that understanding, a survey was conducted by telephone of 400 adults in Hillsborough County from January 7 to February 6, 2013, providing a reliability of 95 percent and a margin of error of ± 4.9 percent. The sample was stratified by the zip codes across the County. The goals of the survey were two-fold: (1) to measure the brand equity for Hillsborough Community College and (2) to provide a profile of the potential adult students and their educational needs.
KEY RESEARCH FINDINGS

Based on the results of the Community Scan, the following is a summary of the main issues that need to be addressed to increase enrollment of adults in the market.

MARKET AWARENESS

The more aware adults are with a college and the more favorable that image, the easier it is for the college to market its programs and services. If adults are not aware of the college, the college is not held in top of the mind awareness and is not thought of favorably, the job of marketing the college becomes more difficult. Overall, the respondents were most likely to mention the University of South Florida; whether it was a first mention or in total familiarity. Sixty-six percent of the adults in Hillsborough County first mentioned the University of South Florida as a college in the area. Thirteen percent first mentioned Hillsborough Community College and 12 percent first mentioned the University of Tampa. The University of Florida is the educational market leader in Hillsborough County with 83 percent of the adults naming it as a college in the areas. However, only 37 percent of the adults mentioned Hillsborough Community College as a college in the area. The College needs to work on the overall awareness of Hillsborough Community College. The goal should be for more than half of the adults in the County to list Hillsborough Community College as a college in the area.

The adults were also asked what word or phrase they would use to describe each college mentioned. It is very important to understand how the adults describe Hillsborough Community College to develop the marketing and recruiting messages for the College. Understanding the current image of Hillsborough Community College will provide the basis for the branding for the College. Overall, the adults in the service area primarily view Hillsborough Community College as a community college that is good and affordable – two niches held by all community colleges in the country. Specifically, the adults used the keywords “local,” “good,” “very good,” “affordable,” “community,” “community college,” and “junior college.” The adults in the community noted that Hillsborough Community College is a local community college – emphasizing the fact that the College is local. They view it as their community college.

It is very important for a community college to continue to be visible to the adults in the local service area – if out of sight, then usually out of mind. The adults in the service area were asked whether they had seen or heard any information about Hillsborough Community College in the last year. The adults are most likely to recall receiving information in the last year about Hillsborough Community College through traditional media. Fifty-five percent recalled seeing something about the College in the newspaper in the last year and 52 percent something on the television about the College. Forty-eight percent of the adults recalled seeing a billboard (or a sign)
about Hillsborough Community College. Thirty-four percent of the adults in the County recalled seeing a brochure about the College and 34 percent remember material mailed to their home, of which 47 percent looked at it and threw it away, 25 percent simply threw it away, 17 percent shared it with someone, and 12 percent either set it aside or kept it. Only 30 percent of the adults in the market recall hearing something about Hillsborough Community College on the radio, which usually has a higher recall. Less than one-fourth of the adults saw anything about the College in electronic media – 14 percent received an email or saw an online ad, nine percent read a blog or the College’s Facebook page, eight percent saw a theater ad, and one percent saw something on Twitter.

It is important to understand the percentage of adults who demonstrate specific knowledge and beliefs about the College and its programs. To measure product knowledge for Hillsborough Community College, adults were asked to name programs at Hillsborough Community College that they felt were of excellent quality. Overall, only 48 percent of the adults were able to name a program they believed was of excellent quality at Hillsborough Community College – 52 percent noted they did not know. Only 37 percent were able to name a second program they believed was of excellent quality, and 23 percent named a third program of excellent quality. The primary programs adults felt were of excellent quality included computer science, English, medical, teaching, business, firefighting, EMT, general education, math, arts, radiology, education, agriculture, psychology, arts, liberal arts, and culinary arts.

Another measure of product knowledge is an assessment of the familiarity of the adults with the products and services offered at Hillsborough Community College. Ninety-three percent of the adults in the County know that Hillsborough Community College offers associate degrees (the primary product) and 68 percent know the College offers certificates, but 22 percent mistakenly believe that the College offers bachelor’s degrees. Almost three-fourths of the adults know the College offers dual enrollment classes for high school students and online courses (73 percent respectively). Slightly more than two-thirds of the adults know the College provides job training (68 percent), Career Resource Centers (68 percent), recreation or leisure classes (68 percent), and 62 percent are aware the College provides testing services. Fewer of the adults know about the Veteran’s programming (56 percent), the Honors Institute and the online degrees (32 percent respectively), and the Kid’s College (only 10 percent). For the majority of the mission centric products and services offered at the College, the adults in the County have good product knowledge.
BRAND AWARENESS
Measuring brand awareness allows a college to understand their brand’s impact. When determining whether to change a college’s colors, or create a new logo or slogan, knowing the percentage of the adults who can accurately describe the key brand components of the College will aid in those decisions. The more adults can describe a college’s brand, the higher the college’s level of brand equity in those elements and the more likely they are to need to be retained.

The adults in Hillsborough County were asked to list the slogan used by Hillsborough Community College, the principal colors associated with the College, and to describe the logo used by Hillsborough Community College in their advertising. The overwhelming majority of the adults were unable to identify the slogan for Hillsborough Community College (98 percent), and those who cited a slogan for the College cited Career Training For Life, Symbol Of Educational Excellence, Your Future Is In Your Hands, 13th Grade, Educational Excellence, Excellence In Learning, HCC, and If You Can’t Get Into Another College Come Here. When asked which principal colors they associate with Hillsborough Community College, 20 percent of the Hillsborough County adults reported blue and 16 percent white, which are the predominant colors used by Hillsborough Community College. While the percentage who could identify the College’s primary colors is not a majority, it is important to note that there is brand equity in the current colors. When asked to describe Hillsborough Community College’s logo, the answers were extremely varied, but a pattern did exist. Many mentioned the letters H, C, C in some way. It should be noted that the common theme of the logo was the three letters – H, C, C – and they should be retained in the logo development, given the brand equity in the recognition of the letters.

Finally, the adults were asked how they would describe Hillsborough Community College to another person. Unfortunately, the majority responded with the same things that adults would say about almost any community college – HCC is good, affordable, a community college, excellent, a good place to start, and very good. It is imperative that the marketing messages provide the adults with more precise, authentic, and inspirational descriptions of the College.

ATTITUDES
The key purpose of surveying adults in a community is to understand their attitudes toward the local community college and to ultimately influence those attitudes, especially if they are negative. But, first the adults’ attitudes have to be understood before they can be changed. Attitudes about a community college are based on the information that adults have about the college, their perceptions, past experiences, feelings (liking and disliking), and their intended behavior. There is a belief, rightly so, that attitudes influence behavior. This is especially true when thinking about
brand equity. If a prospective student likes the community college more than the local state college, there is a good chance he or she will choose the local community college.

To measure the attitudes toward Hillsborough Community College, adults were read a series of statements. For each statement, the adults were asked to indicate their level of agreement by responding with the following: “Strongly Agree,” “Agree,” “Disagree,” or “Strongly Disagree.” Ninety-three percent of the adults in Hillsborough County agreed or strongly agreed that Hillsborough Community College is “an important resource for the community.” Ninety percent of the adults in the County also agree that there is “a campus of Hillsborough Community College located conveniently close to my home.” The College does own the convenience and location niche in the market with its campuses spread across the County.

More than three-fourths of the adults also agreed: “for recent high school graduates, Hillsborough Community College is a good choice for the first two years of a four-year degree” (85 percent); “they teach the kinds of skills needed to get a job in my community” (79 percent); and, “Hillsborough Community College is the most affordable education option in the Tampa area” (78 percent). Three components of the College’s mission are believed by the adults in the Community – opportunities for high school students, pathway to jobs, and affordability.

Seventy-two percent of the adults in Hillsborough County also agreed that the “College offers high-quality academic programs,” and 68 percent agreed “an associate degree in a technical area can be completed in two years and the student will get a good job locally.” But it should be noted that almost 19 percent of the adults did not know enough to agree or disagree with “completion of a technical degree in two years could lead to a good job locally.” Sixty-six percent of the adults also agreed that they believe that “the College is providing such a needed educational service in the community that if they asked me for support, I would agree.”

For the remainder of the statements, the level of disagreement was lower and the percent who did not know enough to agree or disagree was higher. This generally indicates low levels of knowledge about a specific product or service. While 54 percent of the adults agreed with the statement, “If a student attends HCC for two years, all college credits will transfer to a four-year college,” 22 percent felt they did not know enough to agree or disagree with the statement. This indicates a lower level of knowledge about the benefits of the transfer program at the College. And while 40 percent of the residents did not know enough to agree or disagree, 50 percent agreed that “HCC has kept up with the latest technology and is on the cutting edge of course delivery.” Only 30 percent of the adults agreed they are familiar enough with the programs and services offered by the College. All of these statements indicate that there should be more specific product marketing by the College.
When testing attitudes, it is prudent to test both positive and negative attitudes about the College. The good news for Hillsborough Community College is that there was not high agreement with the more negative statements about the College. Only 26 percent of the Hillsborough County adults agreed that “Hillsborough Community College is primarily for those high school students who cannot get into a four-year college or university,” and only four percent agreed that “it is not a real college.” While 34 percent did not have enough knowledge to agree or disagree, only 14 percent agreed that “it is difficult to contact the College if someone has questions about programs or enrolling.” Forty-two percent did not have any knowledge about the difficulty getting through the paperwork, and only 10 percent agreed “it is difficult to get through the paperwork when applying to the College and trying to enroll.”

Nationally, adults tend to believe that community colleges are for those who cannot get into a four-year college or university and that the majority of the students are enrolled in developmental or remedial classes. Hillsborough Community College has been able to avoid those attitudes among the adults in the County. While 38 percent did not know, only 13 percent agreed “the majority of the students at the College are enrolled in developmental or remedial classes.” And only 26 percent agreed that Hillsborough Community College is “primarily for those high school students who cannot get into a four-year college or university.”

It is important for Hillsborough Community College to understand where the adults rank the College with respect to quality. While being local and affordable is a solid niche, if the adults do not believe the College is of high quality, they will be less likely to attend. The University of Florida was rated as the highest quality institution, followed by the University of Tampa, Florida State University, and the University of Central Florida. Hillsborough Community College was rated slightly lower than the University of Central Florida, but had the highest quality rating among the community and state colleges in the area.

MARKETING MESSAGES
During the brand focus sessions conducted with internal and external audiences at Hillsborough Community College, participants were asked to generate words and phrases that best describe Hillsborough Community College: what it is known for today, what misperceptions might exist, and what they would like the institution to be known for in five years. From this, institutional marketing messages were developed by tracing the themes that emerge from the combined analysis of current perceptions, internal aspirations, and operational realities. These messages should describe current truths (authentic) or represent attributes the College is working aggressively to embody in the near future (aspirational). Nine messages were developed for testing with the adults in Hillsborough County.
For each message, the adults were asked to indicate whether it accurately described Hillsborough Community College, and to provide an explanation if it did not. Finally, after all the messages had been evaluated, the adults were asked to indicate which one message most accurately described Hillsborough Community College. The marketing messages that tested the best with the adult audiences for Hillsborough Community College in order of preference (percent noting it accurately described the College) follow:

- Has a powerful connection to the community (80.8 percent)
- Offers outstanding career training that supports the infrastructure and economy of the community (73.8 percent)
- Is one college offering diverse campus environments (74.8 percent)
- Empowers students (73.6 percent)
- Embraces innovation and technology (70.0 percent)
- Is connective and supportive to its students and employees (64.5 percent)
- Provides excellent and challenging academics (63.0 percent)
- Embraces a global perspective (43.8 percent)
- Develops leaders that impact the community and world (46.3 percent)

The first seven messages best resonate with the adults of Hillsborough Community College and are recommended for inclusion in the brand platform for the College. Two of the messages recommended did not test well, and while at a future date they may become marketing messages for the Community, it is not recommended to use them in the brand platform. The adults did not believe that “a community college or its students” can impact the world. And the adults did not believe the message that the College “embraces a global perspective” – they noted that it is not big enough to have a global perspective and that its perspective should be local.

**USAGE**

As adults in the community utilize Hillsborough Community College, the more familiar they become with the College, and the more likely the adults are to interact with College. Interaction is defined as usage – it is a self-reported measure of the usage of the College by the adults, specifically when, where, and what was utilized at the College. Three areas of interaction with the College are tested – interaction as a student, attendance at an event, and participation in job training. The adults are as likely to have applied to the College as attended an event at the College. Overall, 31 percent of the respondents have applied to the College, and of those, 91 percent attended the College, and 35 percent completed a degree. Thirty percent have attended an event at Hillsborough Community College, with the primary events attended including graduation, basketball games, open houses, theater productions, and a multitude of other events. The adults in Hillsborough County are least likely to have participated in job training provided by the College –
either at the College or the employer’s site. Only two percent have participated in job training.

**INTEREST IN ATTENDING COLLEGE**

Many life issues can stop an adult from attending college – personal issues, financial issues, and academic issues. It is important for Hillsborough Community College to understand the issues that may impact the adults’ potential college attendance. To define the potential adult market segments for education in the service area of Hillsborough Community College the respondents were asked, “In the next year or two, would you be most likely to enroll in a college class, seek or finish a college degree, obtain job training for your current job or a new job, earn a professional certification or credential, or take a recreational or leisure class for fun?”

![Interest In Education By Adults In Hillsborough County](image)

In the chart above, 46 percent of the adults in Hillsborough County have an interest in education and training – five percent are interested in taking a college class, seven percent in seeking a college degree, six percent in job training, five percent in certifications, and 23 percent in recreational classes. Fifty-four percent of the adults do not have any interest in seeking education or training in the next year or two.

The majority (68 percent) of those interested in enrolling in a college class prefer to do so for credit. The majority of the adult learners are interested in attending Hillsborough Community College – 68 percent of those interested in a college class, 47 percent of the degree seekers, 65
percent of those interested in job training, 41 percent interested in certifications and credentialing, and 81 percent of those interested in the recreational and fun classes.

For adults, deciding factors as to whether to attend college classes are the times the classes are offered, the delivery methods of the classes, and whether they can afford to attend. Almost half (47 percent) of the potential enrollees plan to be employed full-time 40 hours a week or more while attending, three percent will work part-time 28 to 39 hours per week, 13 percent will work part-time less than 28 hours per week, and 35 percent will not work while attending. The adults who are interested in certification and job training (those who presumably are already employed) are the most likely to work full-time while furthering their education. Those interested in job training are likely to work full-time while attending (61 percent) as are those interested in certifications (77 percent). But the other segments are not likely to work while attending – only 32 percent of those interested in taking a college class would work full-time, as would 47 percent of the degree seekers and 40 percent of the adults interested in recreational classes.

Overall, 52 percent of the potential adult students in the County, regardless of their area of educational interest, would be likely to take classes during the day, preferably 8am to noon (66 percent) on any day. But, the adults interested in taking recreational or fun classes are the most likely to attend during the day. Sixty-four percent of the adults interested in recreational classes would attend during the day, compared to 43 percent of the degree seekers, 42 percent interested in taking a college class, 39 percent in job training, and 32 percent interested in certifications.

The potential adult students are most likely to attend classes in the evening – 60 percent. More than half of all the adults will attend evening classes – 68 percent of those likely to attend college classes, 65 percent interested in job training, 64 percent in certifications, 59 percent interested in recreational classes, and half of those seeking degrees. Forty-six percent of the potential adult students prefer to start evening classes between 6:00pm to 6:29pm and 29 percent prefer to start between 7:00pm to 7:29pm. Nine percent of the adults prefer starting evening classes between 6:30pm to 6:59pm, four percent prefer a start time between 5:00pm to 5:29pm, three percent prefer 5:30pm to 5:59pm, and two percent prefer 7:30pm to 7:59pm, preferably not on Mondays and Fridays.

The potential students are least likely to attend on weekends, but differences exist between the potential adult learners. The adults that are likely to be working, those interested in job training (44 percent) and in certifications (50 percent), are the most likely to attend classes on the weekend. Thirty-three percent of the adults interested in recreational classes would attend on the weekend, as would 26 percent of those adults interested in taking a college class and 30 percent of those seeking a degree.
To reach more of the adults interested in education and training, colleges are making it more convenient for the adult market by offering alternative methods of course and program delivery. Across the country, the colleges experiencing enrollment growth in the adult markets have embraced new course delivery methods for courses and degrees, shortening delivery times. The course delivery method most likely to entice the adults to enroll in a college class is face-to-face courses (90 percent). The degree seekers are most likely to attend online classes (80 percent). All of the adults interested in job training are likely to prefer a face-to-face course delivery. The adults interested in certifications and credentialing are most likely to prefer online courses (91 percent), and the adults interested in recreational classes prefer face-to-face courses (89 percent).

So what degree formats will make the adults more likely to enroll? The adults only interested in taking a class are more likely to prefer an accelerated degree programs (58 percent), while the degree seekers are most likely to enroll in online degree programs (73 percent). The degree format most preferred by those interested in job training is an accelerated degree program (65 percent), while more than half of those interested in certifications and credentialing want a degree program meeting once a month with online work (59 percent). The adults interested in recreational classes are not interested in degree programs of any kind.

The majority of the adult students expect to have to pay and work as they go – 68 percent of those interested in classes, 53 percent of those interested in a degree, 74 percent of those interested in job training, 82 percent of those interested in certification, and 68 percent of those interested in recreational classes.

Electronic media – online information, college websites, mobile phones, and social media – are all changing the way adults gain information about colleges they are interested in attending. There has been an explosion of information in the last decade due to the internet and adults are even more connected today through mobile devices than in the past three years. Overall, 86 percent of the adults in Hillsborough County use the internet regularly, and 96 percent of those have high-speed internet access. The adults are most likely to access the internet using laptops (76 percent) and desktop computers (69 percent), while 37 percent are using tablets and 53 percent are using their cell phones. Overall, 69 percent of the respondents have a Facebook page, 16 percent Tweet, 34 percent use LinkedIn, and two percent do other social networking (blogs, chamber meeting, classmates.com, FourSquare, Google+, Pinterest).
It is also important to understand how the adults utilize traditional media – what do they attend to and when do they attend to it. Overall, 66 percent of the adults have a favorite radio station and those stations include: 89.7 WUSF, 105.5 WDUV, 970 WFLA, and 99.5 WQYK. Seventy-seven percent of the adults have a favorite television show and the top two favorites are “NCIS” and “The Big Bang Theory.” Sixty-six percent of the adults watch television at the time of broadcast and 30 percent watch it recorded. Seventy-two percent of the adults have a favorite television news station, Bay News 9, Channel 13, or Channel 8. Almost two-thirds (62 percent) of the adults read the newspaper, with 57 percent reading the Tampa Tribune and 29 percent the Tampa Bay Times – 83 percent read a paper copy of the newspaper and others read it online. Ninety-one percent of the adults have a cell phone and while 14 percent allow businesses to text them information, 47 percent would allow the college to text information.
ISSUES TO ADDRESS

After an in-depth look at the current marketing and recruitment activities for the adult market at Hillsborough Community College, the current marketing materials, and the research results, the following recommendations were made for the College to increase adult market share.

MESSAGING

In the interviews with staff across the campuses and the District at Hillsborough Community College, three things were evident regarding the adult market:

- The College has not actively recruited adults – the majority of the recruitment efforts at the College have been spent on the high school market. Adults attend but the most effort expended has been attending community events, jobs fairs, and college fairs.
- Messaging is needed to reach the adults in the market. As seen in the awareness research, and supported by interviews across the College, the market knows and likes Hillsborough Community College – but it does not know what it offers or how the College can assist the market.
- Program marketing is needed. This was mentioned by staff and faculty alike across the College. Adults seek programs and if the adults do not know the programs available, it will be difficult for them to see how the College can assist them.

Seven of the marketing messages for the College tested well with the adults in the County. A true test of the validity of the marketing messages is how well an individual message can be translated to a specific audience. In the Brand Platform Report, the marketing messages have been translated for all key audiences of the College. The desired outcome for the adults, 25 to 44 years of age, is enrollment and awareness. The message translation of the key marketing messages for the adult market, ages 25 to 44 years of age, follows:

- Hillsborough Community College has a powerful connection to the community.
  - Translation: Experience the power a degree from Hillsborough Community College holds in the job market.
  - Supporting Evidence: Successful alumni, college partnerships, transfer successes, community involvement, athletics, cultural and entertainment programming, early entry programs, job placement, transfer agreements

- Hillsborough Community College offers outstanding career training that supports the infrastructure and economy of the community.
  - Translation: Hillsborough Community College career training prepares you to become a vital part of your community.
o Supporting Evidence: Fire and rescue programs, health programs, industry and technical programs, business and industry programs

- Hillsborough Community College empowers students.
  o Translation: Take control of your future.
  o Supporting Evidence: Student testimonials, program variety, support services, transfer agreements

- Hillsborough Community College provides excellent and challenging academics.
  o Translation: Expect an exceptional education from Hillsborough Community College.
  o Supporting Evidence: Honors program, accredited, high-quality faculty

- Hillsborough Community College embraces innovation and technology.
  o Translation: Be at the forefront of technology.
  o Supporting Evidence: Technical program’s technology, use of technology in classrooms, use of online tools

- Hillsborough Community College is one college offering diverse campus environments.
  o Translation: There’s a campus to fit your personality.
  o Supporting Evidence: Various sizes and locations of campuses; unique programs, cultural and social offerings; faculty, staff, and students have varying cultural, religious, and racial backgrounds

The College needs to define the supporting evidence, and this will become the basis of the adult enrollment campaign. Every enrollment campaign aimed at the adults should use one or more of these messages.

MARKETING RECOMMENDATIONS

- Develop direct mail campaigns aimed at the adult market in Hillsborough County to increase enrollments in AS programs.

Traditional media is excellent for increasing awareness and overall familiarity, but to increase enrollment, a very specific message has to be delivered directly to a target audience. Hillsborough Community College should invest in targeted direct mail campaigns to increase enrollments among the adult market. Direct mail using variable printing allows for a specific message to be sent to specific households, stratified by educational status. And unlike the mailboxes of a decade ago, less is being sent to
households, which allows the College a better chance of getting their message into the household.

Segment Hillsborough County by educational level – households with no college, some college but no degree, and those with college degrees – and develop a direct marketing campaign for the households utilizing the marketing messages outlined above for the adult market.

The focus should be on the AS degrees available at Hillsborough Community College and the two key messages for the markets should be:

- Hillsborough Community College has a powerful connection to the community.  
  - Translation: Experience the power a degree from Hillsborough Community College holds in the job market.

- Hillsborough Community College offers outstanding career training that supports the infrastructure and economy of the community.
  - Translation: Hillsborough Community College career training prepares you to become a vital part of your community.

- Hillsborough Community College empowers students.
  - Translation: Take control of your future.

A direct mail campaign should be sent every three months (four campaigns each year). In addition, using variable printing, the campus closest to the zip code can be highlighted as the campus to contact. Utilize a tracking mechanism for the post cards, such as an adult landing page or a QR code.

- Develop a college-wide credit fair to entice the adults with some college and no degree to complete a degree.

Many of the adults who are interested in taking a college class and seeking a college degree have not completed an associate degree – they have a collection of college credits that may or may not add up to a potential degree. The College should host a college-wide (all campuses participating on the same day) in a “Credit Fair.” The message for the adults is to bring in those transcripts, or even a list of what college classes you have taken, and you can meet with advisors at the College to see if those credits can be dusted off and have value. The concept is much like the television show, “Antiques Roadshow,” where people bring in items from the past and find out the value.
This is not meant to be an official transcript review, but a conversation about what the adults are interested in pursuing, and how their past college credits can “jump start” them into that career path. To make this work, the student services staff has to be available to assist in developing a potential degree plan. Financial services personnel should be available to discuss the potential ways an adult can pay for the education. And if the adult is interested and actually applies, the transcript evaluation has to be immediate – not two or three semesters after enrollment.

To market the event, multi-media channels should be used – radio, newspaper, and television. In addition, the College should send personal invitations to the students from the last five years over the age of 25 that have left the College without completing a degree. And the College should work with major employers to promote the event to their employees as well. This event should be conducted at least three months prior to a semester start to allow time for processing the enrollee. Contact information should be gathered from all attendees and follow-up done by the EDCs at each campus to move them toward enrollment.

- Explore the development of credit programming that will provide certifications to the adults who have completed bachelor’s degrees and higher in the market. The credit “certificate” will lead to successful completion of a national certification test.

The College has done an excellent job of providing the academic programming for adults to complete an associate degree or transfer to a bachelor’s degree, but as the adults increase their overall educational levels, the adults with bachelor’s or Master’s degrees may offer a new market for the College. Five percent of the adults interested in education and training are interested in credentials and certifications. The credentials or certifications of interest to the adults are in project management, CompTIA, certified records management, consulting meteorology, electrical certification, engineering general review, environmental, finance, human resources, health management, insurance, financial planning, medical billing and coding, medical, Microsoft A+, nursing, paralegal, and property insurance. This may present a new market opportunity for the College. At some colleges, the certifications are being taught for credit by the noncredit side of the college.

An example of this type of programming is seen at Pima Community College (see next page). Under the College’s list of Credit Programs and Degrees, the College has a Fraud Examination Certificate. This program is comprised of nine credits and leads to preparation for the Certified Fraud Examiner (CFE) examination, and the adults can complete the program exclusively in the evening.
Hillsborough Community College has to continue to broaden the online programming and degrees available and provide support services for the students choosing online delivery of degrees.

While the adults interested in taking a class prefer face-to-face delivery, 80 percent of the degree seekers are most likely to attend online classes and 91 percent of the adults interested in certifications and credentialing are most likely to prefer online courses. Adults who are seeking degrees want to complete the program as quickly as possible. The competitive market has broadened immensely in the last decade with the explosion of online offering and programs. Hillsborough Community College needs to define the programs that can be completed online and make it easy for the student to find the programming.
Examining the College’s website, under the program information, it is not clear what programs can be completed online, as seen in the screen print of the College’s website under Associate in Arts.

When the potential enrollee examines the list of programs and clicks on the advising guide, it is unclear what programs can be done online. If all can, there needs to be a place on the page or on the website that informs the students of the availability of online programming.

Clicking on the distance learning tab on the College’s homepage provides more information about distance learning courses – but not degrees.
Clicking on the Distance Learning Course Offerings on the Distance Learning page does not provide any additional information about online degrees but it does provide a link to the distance learning courses.
Finally, after clicking on the Search for Distance Learning Courses link, a new window opens that allows for a student to click distance learning classes only.
If the Distance Learning sections only box is checked, a list of online courses for an upcoming semester is shown. But this does not easily provide a student access to the list of online courses – and it is very difficult to find the degrees that can be offered even with the plethora of online courses offered.

- Increase the online click per pay advertising for Hillsborough County by program name.

Adults are most likely to go to a search engine, typically Google, and type in a program name when they are interested in enrolling. The College needs to use search engine optimization to make sure that all of their programs are shown as well as pay per click advertising, preferably then taking the inquiry to an e-brochure to request information about a specific program or a landing page that captures the inquiries’ contact information for follow-up. Online advertising is needed for the specific programs at the College, especially since the potential inquiries are most likely to search online for information. If the programs do not show up in an online search, potential students will never know the College has the program.

WEBSITE

- Programs are the key to adults when examining a College for enrollment. Hillsborough Community College needs to redesign their program information to make it easy for students to find the programming offered quickly and easily.

The homepage of Hillsborough Community College’s website lists Academics at the top and not Programs or Programs of Study. Generally potential students are looking for a quick tab for the programs offered by the College.
The Academic at the top of the page may not necessarily be the language needed for the potential students who are seeking programs.
When Academics is clicked, there is a bulleted list of items including Associate degrees, Associate in Arts, Associate in Science, Technical Programs, Health Science Programs, etc. When potential students search for programs, they generally may not be sure whether the degree is an AA or an AS, or how the College has categorized it. Potential students look for program names categorically. An example of a possible way to present the programming is Pima Community College and it is presented in the following screen prints from their website.

Potential students are provided a choice to type a program name in the box in the screen print above, or can browse categories by clicking on the + next to the categorical names.

When the + is clicked, a list of programs appear.
The list not only shows the program name but also provides information as to whether it is a transfer program or a terminal degree, named direct employment.

When clicking on the name of the program, the actual courses needed for the degree are shown (see screen print next page).
• Develop an adult landing page for the adults who respond to a marketing campaign at the College.

Landing pages allow a College to measure the success of the marketing efforts. The College should develop an adult landing page that will provide direct links to the information that is important to students – programs, costs, schedule, and how to enroll.
NON-RETURNING STUDENT SCAN

Hillsborough Community College
Project Summary
NON-RETURNING STUDENTS

Retention is a major concern for colleges today – the national media has begun to scrutinize the retention, and ultimately the completion, of the students enrolled at the community colleges. Compounding the retention issue are the changes in states’ funding formulas away from enrollment to retention and completion – thus questioning the effectiveness of community colleges.

Regardless of the issues in the national press, student success is at the heart of every community college. And to attain success, a student has to complete a class, a program, or a degree. The students that are of the most concern in the non-returning category are those full-time students who attend for one or two semesters and then simply leave without completing a program – leaving while in good standing. For many younger students who are seeking a bachelor’s degree, a community college may be losing them to a four-year university sooner than they should. But the final issue for Hillsborough Community College is the simple fact that it is more cost-effective to retain students rather than recruit new students.

To gain a better understanding of the persistence and retention of the first time in college students, the enrollment in Fall 2010 was examined to determine how many students remained one semester, one year, graduated, or returned. In Fall 2010, Hillsborough Community College enrolled 3,481 students in credit classes for the first time at the College. Within one year, only 59 percent of the students had returned – 41 percent did not return to the College.

Persistence Of First Time In College, Fall 2010

- Did Not Return After 1 Semester: 469, 13%
- Did Not Return After 1 Year: 931, 27%
- Student Graduated: 19, 1%
- Student Returned: 2062, 59%
Of those first time Fall 2010 enrollees, 59 percent of the students (2,062 students) continued their enrollment at the College to Fall 2011. Only one percent (19 students) of the first time in college students in Fall 2010 graduated. Of the 1,419 students who did not return, 469 students (13.5 percent) only completed the Fall 2010 semester and did not re-enroll for Spring 2011 or Fall 2011 and 931 students (26.7 percent) completed one year – they completed Fall 2009 and Spring 2010 and did not continue in Fall 2011. Overall, 41 percent of the first time in college did not return in Fall 2011, and of those, 33.5 percent did not return after one semester and 66.5 percent did not return after one year.

The majority of the first time students who did not return after one semester or one year were 19 years of age or younger – 68 percent of the non-returning students who left after one semester were 19 years of age and younger as were 75 percent of the non-returning students who left after one year. Fifteen percent of the non-returning students who left after one semester were 20 to 24 years of age as were 11 percent of the students who left after one year. Less than 10 percent of the first time non-returning students were 25 to 34 years of age (10 percent of those who left after attending one semester and seven percent who left after one year). Three percent of the non-returning students who left after one semester and four percent who left after one year were 35 to 44 years of age. Less than three percent of the non-returning students who left after one semester were 45 years of age or older as were one percent of those who left after one year.

The first step in understanding why 41 percent of the first time in college students at Hillsborough Community College did not stay until completion is to compare the characteristics of the students who did return with those who did not – the returning versus the non-returning. This provides insight into why the students did not return to the College. Hillsborough Community College provided a dataset on the first time students enrolling in Fall 2010 to CLARUS Corporation. This dataset was based on the information provided on the application to the College by the Fall 2010 first time in college students. This dataset included enrollment data, demographic information, geographic locations, and educational characteristics.

The major differences noted between the returning and non-returning students who attended for the first time in Fall 2010 included:

- Age: The older the first time in college students, the more likely the students were to only attend one semester.
- Financial Aid: The students who did not receive financial aid were less likely to return to the College.
- Attendance Status: Part-time students were less likely to return to the College – they enrolled in fewer credits than the students who returned.
• Application Date: The closer to the start of the semester the student applied, the less likely the student was to return.
• Developmental Placement: The non-returning students were less likely to enroll in developmental Prep classes than the returning students, even though the placement rates were the same.
• Attendance Times: The students who were more likely to attend classes at night and on the weekends were less likely to return to the College.
• Grades: The students who had lower GPAs and a higher percentage of F’s for the term were less likely to return.
• Non-Degree Seeking: The students who noted they were non-degree seeking were less likely to return to the College.

The major differences noted between the first time in college students for Fall 2010 at Hillsborough Community College mirror what is occurring nationally. The key issues are academics, finances, and part-time attendance in which life can impact (personal issues). The challenge for the College is to assist the non-returning students in persisting in their educational pursuits at Hillsborough Community College.

In order to accomplish that, the College needs to understand more about the first time in college students that attend one year or less. To provide that understanding, telephone interviews were conducted with first time in College students (Fall 2010) who attended only one semester or one year at Hillsborough Community College and did not return. Hillsborough Community College provided CLARUS Corporation with contact information for 1,366 non-returning students fitting this parameter. All of the 1,366 names were exhausted – many of the numbers provided were incorrect or missing. For the numbers that were available, up to 10 attempts were made to contact the individuals, varying across weeks, days, and time of the day. One hundred seventy four (174) surveys were completed from the 1,366 non-returning student names. These surveys were conducted during the day and evening hours from November 6 to 28, 2012.
KEY RESEARCH FINDINGS
The following is a summary of the primary research findings from the surveys of the non-returning students – the first time in college at HCC in Fall 2010 – who only attended one semester or one year at the College.

ACTIVITIES PRIOR TO APPLYING TO HCC
As would be expected, the youngest non-returning students (those age 19 and younger) were most likely attending high school or recently graduated prior to their application to Hillsborough Community College (80 percent), one percent was attending another college, and 19 percent were working. For the non-returning students 20 years of age and older, the majority were working – 58 percent of the 20 to 24 year olds, 82 percent of the 25 to 34 year olds, and 64 percent of the 35 to 44 year olds.

The 20 to 24 age group were the most likely to be attending another college – 17 percent were attending a local proprietary college – and they applied to HCC due to its convenience (to take a fast course they needed). When asked if they had considered HCC at the time they enrolled at the other colleges, half did in fact consider HCC then, but they did not attend due to money problems.

CHOOSING HILLSBOROUGH COMMUNITY COLLEGE
Location was a major reason that the non-returning students chose to attend HCC but many of the non-returning students applied to HCC because it was close, cheaper, close to home, the closest, convenient, a good school, and nursing program. Specific programs were also key for many of the returning students.

The non-returning students were asked whether Hillsborough Community College was their first choice as a college to attend and for the majority of the respondents (82 percent), Hillsborough Community College was their first choice. In fact, only 22 percent of the 19 and younger group said it was not – all of the other non-returning students agreed that it was. For the 19 and younger non-returning students who noted another college was their first choice, 39 percent listed the University of South Florida (39 percent).

The younger non-returning students were more likely to enroll full-time at HCC – 65 percent of those 19 and younger and 67 percent of those 20 to 24, compared to 36 percent of those 25 to 34 and 36 percent of those 35 to 44. Older non-returning students were more likely to be part-time enrollees – almost two-thirds.
Just as the youngest non-returning students were the most likely to have a first choice college other than HCC, they were the most likely to have applied to another college when they applied to HCC. The non-returning students 19 and younger were the only students to apply to another college when they applied to HCC – all of the non-returning students 20 years of age and older only applied to HCC. Twenty-four percent of the 19 and younger students applied to at least one other college while applying to HCC because they wanted to go to a university, a college out of the area, or for a specific program. Twenty-seven percent also applied to the University of South Florida, as well as the other four-year and two year colleges (public and proprietary) in the state of Florida.

The primary educational goal for the majority (66 percent) of the non-returning students interviewed was to get a degree. Sixty-six percent of the 19 and younger group were seeking a degree, as were 83 percent of the non-returning students in the 20 to 24 age group, 54 percent of the 25 to 34 age group, and 64 percent of the 35 to 44 age group. The degree sought by most of the respondents was an AA. Major areas of study for the AA degrees being sought by the non-returning students included business, criminal justice, medical, nursing, and undecided.

Job training was the educational goal for the older non-returning students – five percent of the 19 and younger, eight percent of the 20 to 24 age group but 27 percent of the 25 to 34 age group and 18 percent of the 35 to 44 age group.

Overall 17 percent of the non-returning students planned to transfer to another college – 19 percent of the 19 and younger, eight percent of the 20 to 24, 18 percent of the 25 to 34, and none of those in the 35 to 44 age group. For the 17 percent who planned to transfer, the predominant planned transfer institution for the 19 and younger group was the University of South Florida – 63 percent planned to attend USF. The rationale given for not going directly to those colleges included applied too late, HCC was only option, did not get in, cheaper to get gen eds, not ready, not accepted, financial reasons, didn’t meet criteria, HCC more affordable, health issues, personal reasons, SAT score too low, and university intimidating.

INFORMATION SOURCES
First, the non-returning students were asked where they had first gained information about Hillsborough Community College. Not surprisingly, nearly half (48 percent) of the 19 and younger group first learned about the College at their high school. Thirteen percent of the 19 and younger non-returning students gained information about HCC online, 22 percent from friends and family, just one percent from an employer, and 16 percent from another source (went to the college). Seventeen percent of the 20 to 24 year olds first got information from their high schools, while one-fourth went online, another one-fourth got it from friends and family, and one-third cited
another source (career manager, orientation, went directly to HCC, and went to College and talked to counselor).

Only nine percent of the 25 to 34 year olds got information from their high school, while 27 percent gained information about HCC online, 36 percent from friends/family, and 27 percent from another source (went to College as a walk-in, went directly to HCC). In the oldest group, the non-returning students 34 to 44, none gained information from their high school, but 54 percent got it online, 27 percent from friends or family, nine percent from an employer, and nine percent from another source (MacDill Air Force Base). Examining the other sources cited, it appears that the primary other source listed is the students physically going to the College to gain information.

For the non-returning students who received information from a high school, they primarily received it from a guidance counselor or teacher. The websites used by the non-returning students who first got their information online were Google (Googled colleges in the area and checked out their sites) and the HCC website (for those who remembered). The family and friends cited as information sources were mainly friends, followed by family members – brother, cousin, dad, godmother, mom, siblings, and sister.

The non-returning students were then asked if the information they received was sufficient to answer all the questions and, for both the youngest and oldest groups, it may not have been. Ten percent of the 19 and younger non-returning students and 18 percent of the 35 to 44 year old non-returning students did not receive enough information during the enrollment process (the other two age groups felt the information was sufficient).

A major source of information for the non-returning students at Hillsborough Community College is the website – 74 percent of the non-returning students used the HCC website during their search for information about the College. While this is a good percentage using the College’s website, generally more than 90 percent use a college’s website to gain information. Seventy-six percent of the 19 and younger group and 73 percent of the 35 to 44 group used the HCC website, compared to 58 percent of the 20 to 24 group and 64 percent of the 25 to 34 group. The rationale cited by those who did not use the website included: counselor gave me what I needed, didn’t come to mind, didn’t know it existed, didn’t need to, got information from the college, had what I needed, wanted to ask questions face-to-face, not tech savvy, no computer, and went to campus.

For those who used the website, nearly all (95 percent) found it useful – 94 percent of the 19 and younger non-returning students, and all of the other non-returning students. For the six percent of the 19 and younger non-returning students who did not find the College’s website useful, they noted that information was hard to find, they just weren’t good at technology, it was hard to
search/ sent me to the wrong areas/ gave me information I wasn’t even asking for, not user friendly, and too confusing.

The primary information the students were seeking on the site included classes, as well as financial aid, cost, programs, degrees, and enrollment info. For the majority (92 percent) of the non-returning students, they found the information needed was easy to find, and again those who did not (eight percent) were age 19 and younger. Primarily they thought it was confusing and difficult to find the information needed – navigation issues.

The non-returning students were asked how they applied to Hillsborough Community College and whether they encountered any problems during the application process. The trend across the United States is for a majority of the applicants to apply to a college online but HCC still has a percentage that are using paper applications. Overall, 60 percent of the non-returning students applied online while off-site, 13 percent applied online at the College, five percent used a paper application off-site, and 22 percent used a paper application at the College. The non-returning students 25 to 34 were most likely to fill out a paper application at the College (46 percent, versus 21 percent of 19 and younger, 25 percent of 20 to 24, and nine percent of 35 to 44). In addition, 12 percent of the 19 and younger group, eight percent of the 20 to 24 group, 18 percent of the 24 to 35 group, and 18 percent of the 35 to 44 group applied online at the College. Five percent of the non-returning students filled out a paper application and dropped it off, mailed it, or faxed it to the College.

The non-returning students were asked if they encountered any difficulties submitting the applications and only seven percent of the non-returning students reported encountering any difficulties in the process (seven percent of the 19 and younger and eight percent of the 20 to 24 and 35 to 44 non-returning students. The difficulties encountered included long lines at the college and difficulties getting through the online application.

APPLICATION DATE
National research indicates that the last students enrolled, from a retention viewpoint, are typically the first ones out the door – or the most likely to not return to the College. And the older non-returning students are more likely to apply close to the semester start. Thirty-nine percent of the 19 and younger non-returning students applied three months or more prior to the start of the semester, 19 percent applied two months prior, 19 percent applied one month prior and 22 percent applied less than one month prior to the start of the semester.

The non-returning students in the 20 to 24 age group were the least likely to apply close to the semester start – 25 percent applied three months or more prior to the semester start, 25 percent
two months prior, 42 percent one month prior, and eight percent less than one month prior to the semester start. Thirty-six percent of the non-returning students in the 25 to 34 age group applied to HCC three months or more prior to the start of the semester, while 18 percent applied two months out, 27 percent one month out, and 18 percent less than a month before the semester start.

The oldest non-returning students were the most likely to decide to apply the closest to the start of the semester. Twenty-seven percent applied three months or more prior to the start of the semester, 45 percent applied two months prior to the start of the semester, 18 percent one month out, and nine percent applied less than a month before the semester started.

FINANCIAL AID
Lack of funds can be a major reason for not persisting at a college for some students. The non-returning students were asked whether they applied and received financial aid. Generally, non-returning students are unlikely to receive financial aid but this was not the case for the non-returning students at Hillsborough Community College. Overall, 31 percent did not apply for financial aid, 19 percent applied and did not receive aid, and 49 percent applied and received financial aid – but it did vary by age of the non-returning students. The major reasons for not applying for financial aid included no need, had enough money, Florida Prepaid, parents paid, Bright Futures, and scholarships.

Thirty-three percent of non-returning students age 19 and younger did not apply for financial aid. Twenty-one percent applied for it but did not receive any aid, 45 percent did receive aid, and one percent didn’t know if they applied. For the non-returning students in this age group who received aid, 75 percent got Pell grants, 16 percent scholarships, 22 percent loans, and 13 percent other aid (Bright Futures, FAFSA, and not sure). In the 20 to 24 age group, 42 percent did not apply, eight percent did but were not eligible, and 50 percent received aid. For the 50 percent who received financial aid, 83 percent received a Pell grant and 17 percent got a loan.

Nine percent of those 25 to 34 did not apply for aid, 27 percent did but did not receive it, and 64 percent received financial aid. The aid received included Pell grants (86 percent), loans (14 percent), and work-study (14 percent). Eighteen percent of the respondents age 35 to 44 did not apply for financial aid, but the remainder did – and received it. Fifty-six percent received Pell grants, 22 percent got loans, and 44 percent received other aid (FAFSA grants).

ENCOURAGEMENT TO ATTEND HCC
The non-returning students were asked if anyone encouraged them to attend Hillsborough Community College or if anyone discouraged them from enrolling at HCC. Overall, one-third of the respondents were encouraged to attend Hillsborough Community College, nine percent were
discouraged, and the remainder had neither encouragement nor discouragement. Thirty-two percent of the 19 and younger non-returning students were encouraged to attend the College. Those who encouraged them were mainly family members, who told them to get a better education, get a degree and transfer, good place to get a degree, it’s a good thing, convenient, and better than other colleges they looked at. They were also encouraged by friends, who told them it was accredited and a good college. Nine percent of the 19 and younger students were discouraged from attending by teachers and colleges (don’t go to community college), friends (parking, other colleges better, go to regular college), by HCC (put on academic probation). Forty-two percent of the respondents ages 20 to 24 received encouragement to attend HCC from friends (better job opportunities, right fit, good teachers). In the 25 to 34 group, 18 percent were encouraged and nine percent were discouraged. A friend or girlfriend told them they needed to go, and others received discouragement from an ex-girlfriend and a mother. And finally, 54 percent of the 35 to 44 year olds were encouraged to attend the College, specifically by coworkers, family members (get better jobs, help in the long run, good to start with, good college), and nine percent were discouraged by a friend (do not go).

CONNECTIONS WITH HCC

National research on first year experiences for students indicates that when students make connections with a college, they are more likely to stay at the college. If students do not make connections, as is sometimes difficult on commuter campuses, they are less likely to persist. The non-returning students were asked if there was anyone at Hillsborough Community College that they visited with regularly, as well as connections with staff, faculty, and classmates at the College.

The non-returning students were unlikely to have visited regularly with personnel at the College. Thirty-seven percent of the 19 and younger non-returning students and 54 percent of the non-returning students in the 25 to 34 and 35 to 44 age groups visited regularly with College personnel, compared to just 17 percent of those in the 20 to 24 age group. The persons the non-returning students were most likely to have visited with included alumni/ disability office, classmates, counselors, faculty member, friends, roommate, students, and study group. The primary rationale for not regularly interacting with anyone at the College included no need, no time, wasn’t sociable, didn’t need to, didn’t want to, too busy, and no reason.

The non-returning students were also asked to share their interactions with staff members at Hillsborough Community College – specifically whether they interacted with staff and any outcomes if they tried to contact staff at the College. The older non-returning students were very likely to interact with staff members – 92 percent of those 20 to 24, 91 percent of those 25 to 34, and 91 percent of those 35 to 44, compared to 74 percent of those 19 and younger. The main reasons cited by the non-returning students for not having any interaction with staff was that they
were too busy (work, classes), they didn’t have any reason to, they didn’t know when a counselor was available, only took one class, shy, nobody seemed friendly, professors weren’t into the students, and too long to wait to talk to them.

Overall, over half (53 percent) of the non-returning students attempted to contact a staff member at the College – 58 percent of the non-returning students 19 and younger, 27 percent of those 20 to 24, half of those 25 to 34, and 40 percent of those 35 to 44 years of age. Twenty percent of the non-returning students noted it was very difficult or somewhat difficult to contact a staff member, but it varied by age. The non-returning students in the 20 to 24 age group did not have any difficulty contacting staff and all of these students used email for the contact. But 20 percent of the non-returning students in the 19 and younger age group noted it was very difficult or somewhat difficult to contact staff because the emails are not answered and when calling, they are put on hold, transferred, and even hung up on. Seventy percent of the 19 and younger non-returning students used email for the contacts, eight percent the phone, and 21 percent another method, primarily went to the college in person. Twenty percent of the non-returning students in the 25 to 34 age group also reported difficulty in contacting a staff member because the student had to go through student services to get a question answered. Sixty percent of the non-returning students in the 25 to 34 age group attempted to contact via email and the balance went to the College to see someone in person. One-fourth of the older non-returning students – those 35 to 44 – also reported difficulty in contacting a staff member – the staff member did not check email for a long time – and all of these students used email for the contact.

While students interact with faculty in the classroom, many of those interactions are one-way – from faculty member to student. The richer interactions between faculty and students typically occur outside of the classroom in conversations between the two. The older the non-returning student, the more likely the student is to interact with a faculty member outside of the classroom. Forty-five percent of the non-returning students in the 25 to 34 age group and 36 percent in the 35 to 44 age group interacted with a faculty member outside of the classroom, compared to only 31 percent of the non-returning students in the 19 and younger age group and 17 percent of the 20 to 24 year olds. The primary reasons cited by the non-returning students for not interacting with faculty outside of the classroom included no need and saw no reason to visit with their faculty member. Others noted they went straight to work, did not want to, and never saw the teacher outside of class.

While none of the non-returning students in the 20 to 24 age group attempted to contact a faculty member, 74 percent of the 19 and younger, 80 percent of the 25 to 34, and half of the 35 to 44 non-returning students did. Of those who contacted a faculty member, only six percent of the non-returning students in the 19 and younger age group reported any difficulty in contacting a faculty
member. Email was the primary form of contact attempted with the faculty members but the older non-returning students were likely to try and call faculty members.

Finally, the non-returning students were asked if they had ever interacted with their classmates outside of class when they were attending Hillsborough Community College. With respect to classmates, overall 18 percent worked with classmates outside of class, 18 percent visited with them socially, 37 percent did both, and 26 percent did neither. The primary reasons for not interacting with their classmates outside of class included no need, didn’t know anyone, wasn’t sociable, too busy, didn’t want to, and had to go to work.

The non-returning students in the 25 to 34 age group appeared to have the most interaction with their classmates – 18 percent worked with them outside of class, 18 percent visited with them socially, 45 percent did both, and only 18 percent did not interact with them. Thirty-nine percent of the 19 and younger non-returning students visited with classmates socially and worked outside of class with them, 19 percent only worked with them outside of class, 16 percent visited with classmates socially, and 26 percent did not interact. The 20 to 24 and 25 to 44 non-returning students were the least likely to interact with classmates – 33 percent of the non-returning students in the 20 to 24 age group and 36 percent in the 35 to 44 age group did not interact with classmates. One-fourth of the non-returning students in the 20 to 24 age group worked with classmates outside of class, 17 percent visited with them socially outside of class, and 25 percent did both. Only nine percent of the non-returning students in the 35 to 44 age group worked with classmates outside of class, but 36 percent interacted with them socially outside of class, and 18 percent did both.

NOT RETURNING TO HCC
Personal issues were the primary reasons cited for leaving Hillsborough Community College prior to completing a degree – 68 percent – and 32 percent of the non-returning students left due to financial issues, 15 percent left because of academic issues, and less than one percent left because of technology issues (payment issue).

The respondents were most likely (68 percent) to not return due to personal or life reasons. This was especially true for the older non-returning students – 91 percent of the non-returning students in the 25 to 34 age group and 82 percent of those in the 35 to 44 age group did not return because of personal issues. Sixty-six percent of the non-returning students in the 19 and younger age group and 58 percent in the 20 to 24 age group also did not return due to personal issues. For those who were willing to share the nature of their personal issues, it was as varied as the individuals themselves – examples listed include illness, family problems, jail, moving, pregnancy, etc. Many of the non-returning students felt there was no way HCC could have helped them with their
personal issues – there was nothing the College could have done. But a few did note ways that the College could have helped with their personal issues and those included provide correct information on placement tests, shorter programs, guided me differently, childcare, be willing to work with me, find me scholarships, offered the program, offered business program, and provided more information about transportation locations.

Sixteen percent of the non-returning students cited academic reasons for not returning to Hillsborough Community College – 15 percent of the 19 and younger, 17 percent of the 20 to 24 group, and 18 percent of the 25 to 34 and 35 to 44 age groups. For those who cited an academic reason for leaving HCC, 24 percent (all 19 and younger) utilized academic support services, namely 24/7 Think Smart, math, tutoring, and writing and math centers. When asked if those services helped, 40 percent said yes, they were very helpful. But, respondents noted it was hard to explain online to students, frustrating by the time they ask you a million questions, and weren’t helpful/ students ran it/ didn’t care/ only helped each other. Too busy, not sure it would have helped, and other things impacting life were the primary reasons for not utilizing the academic support services. While many of the non-returning students with academic issues noted there was nothing the College could have done to help, others said better communication was needed, and they had difficulty with transcripts, teachers, prices, computers, transfers, and daycare.

Thirty-two percent of the non-returning students noted they did not return to the College due to financial reasons. Thirty-one percent of the 19 and younger non-returning students expressed financial issues as the reason for not remaining at HCC, as did half of the 20 to 24 year old non-returning students. Eighteen percent of the non-returning students in the 25 to 34 age group and 27 percent of those in the 35 to 44 age group did not return because of financial issues. Overall, the students simply ran out of money and could not afford to live and attend. The major ways that HCC could have helped the students with financial issues, other than those who noted there was nothing the College could have done to help, others said better communication was needed, and they had difficulty with paperwork, help with financial aid forms, and financial aid.

AFTER HILLSBOROUGH COMMUNITY COLLEGE
It is important for Hillsborough Community College to understand what the non-returning students did after they stopped attending HCC. Did they attend another college or work? Would they be willing to return to HCC in the future to continue their education if they did not? Thirty-nine percent of the former students 19 and younger, 25 percent 20 to 24, 18 percent 25 to 34, and 27 percent 35 to 44 attended another college after Hillsborough Community College, primarily local community colleges and state colleges and universities in the area. The primary reasons for attending another college included they moved there, it was closer to home, wanted to go there, hometown, better choice, and no waiting list.
The non-returning students who did not attend another college after failing to return to HCC – 61 percent of the non-returning students 19 and younger, 75 percent of the non-returning students ages 20 to 24, 82 percent of those 25 to 34 years of age, and 73 percent of those 35 to 44 years of age – were asked what they did. Primarily if the non-returning students did not attend another college, they worked. Some joined the military, others stayed home or took care of kids.

Finally, the non-returning students who did not attend another college were asked if they planned to enroll at HCC in the future. Overall, 56 percent plan to re-enroll at the College if they did not attend another college – 54 percent of the 19 and younger non-returning students, 78 percent of the 20 to 24 age group, 44 percent of the 25 to 34 age group, and 75 percent of the 35 to 44 age group. When asked if they needed any assistance from HCC to re-enroll, while the majority said no, financial assistance was the primary assistance needed by the non-returning students who plan to re-enroll at HCC. Most of the non-returning students plan to return in Spring 2013.

For the non-returning students interested in re-enrolling at HCC, they were asked their preferences for communication – the best method by which HCC can provide information to them. Mail and email are the best forms of communication – regardless of age.
ISSUES TO ADDRESS

After an in-depth look at the comparison of the characteristics and attendance patterns for the non-returning students and returning students at Hillsborough Community College, the research results from the non-returning students, and interviews with personnel at the College, the following recommendations were made for the College to increase persistence.

COMPETITION WITH OTHER COLLEGES

Although the educational goal for a majority of the non-returning students at Hillsborough Community College was to get a degree, their behavior was that of transfer students. Even though the majority did not cite that their goal was to transfer, their behavior implied a different intent – they applied to other colleges (predominantly four-year colleges) when they applied to Hillsborough Community College and, after leaving HCC, they attended other colleges. A small group of the non-returning students actually noted they were only at HCC to pick up a class or two before they continued their education at another college. In addition, another group of the non-returning students that left HCC enrolled in proprietary colleges in the area, which are direct competitors of the College. Based on the transfer behavior, HCC should consider the following:

- Develop a transfer advising path to assist the students who are interested in transferring to a four-year college successfully complete an AA prior to leaving Hillsborough Community College.

A majority of the younger non-returning students enter Hillsborough Community College with a plan to transfer to a four-year college, and they see themselves at Hillsborough Community College for only a short time frame – a semester or less. These non-returning students had planned to attend a four-year college but were not successful in accomplishing that goal – whether due to grades, location, finances, etc. Attending Hillsborough Community College for one semester and then moving to the transfer colleges as was noted by the non-returning students may not be in the best interest of the students. If their grades or test scores precluded them from entering the four-year of their choice, one semester at Hillsborough Community College will most likely not solve the skills deficit issue for them – and most did not take the developmental classes they placed into. If money is an issue and prevents the students from attending the four-year college of their choice, then money will most likely remain an issue for the students.

The first time students who list the intent to transfer or who list an AA for transfer degree should automatically be referred to a transfer advisor and the advisor should schedule several sessions with the student during the first semester of classes. The purpose of these
sessions would be to work with the student to lay out a transfer plan for the college and degree area of interest. With the numbers interested in transferring, the College may establish a series of quick transfer updates or workshops for the students and work hard to ensure participation with email reminders, phone calls, and direct mail invitations.

- Explore development of programs delivered in accelerated formats for the non-returning students who are looking at the programming at the proprietary colleges, and evaluate the current programming being offered by the proprietary colleges in reference to the programs offered at HCC.

Proprietary colleges do an excellent job of recruiting students – they have a hands-on recruitment model and assist in packaging a variety of financial aid sources for the students. But these colleges also offer students very structured programs that can be completed in a quick sequence. As more students evaluate the cost of a degree – associate or bachelor’s degree – reducing the time spent in college is a key goal. The College should provide a very structured completion path for programs at HCC and then market the two year structure to the students who are looking at the programs. This structure helps lock students into the degree program and will assist in their persistence.

Hillsborough Community College also needs to examine the programming that is being offered by the proprietary colleges to make sure that they still have a competitive advantage with respect to the offerings. For example, software development is an area that is very much in demand nationally, and ITT Tech has added an associate degree in the area. When examining HCC’s website and programming list, software development is not a degree title. If the College is offering the program, the names of the current programming should be examined to allow students to compare programming. This is not meant as a criticism of Information Technology at the College, but only an example to ensure that the market names of the programs are consistent with current market needs and competitors.

ORGANIZATIONAL ISSUES
When comparing the characteristics of the returning and non-returning students at Hillsborough Community College, several factors impacted the persistence and retention of the students – finances, late applications, developmental placement, night and weekend attendance, and grades. Organizationally, Hillsborough Community College should examine ways to address these issues for students and be pro-active in assisting the students (helping them stay) rather than reactive (trying to get them to return after they leave). The College should examine their current systems in the following areas to see if there are ways that intervention can occur earlier, or intervention be developed in areas where it is not available.
• Establish an application deadline several weeks prior to the start of the semester and develop a late start session with programming for the late applicants.

A common characteristic among the non-returning students at Hillsborough Community College, which mirrors the national research, is the last students in are the first to go. Examining the research data on the non-returning students, a majority actually applied within the last month prior to the start of the semester, and even after the start of the semester in some cases. This is supported by not only the application date, but the number of paper applications that are completed at the campuses of Hillsborough Community College. Hillsborough Community College should establish an application deadline a few weeks prior to the start of classes. For anyone who applies after this date, the student will only have a late start option, which has to be carefully designed to offer the beginning programming needed for these students, or the student will have to wait until the next semester to enroll. If the College establishes an application date, they must adhere to it. The danger for a college is that when enrollments are shaky or are heading down, the college will ignore the application date and take anyone – much to the detriment of the student.

• Provide financial assistance counseling to students, not just financial aid awarding.

With the centralization of the processing for financial aid, the financial aid counselors on the campuses should shift into financial aid counseling and not just “paper pushers.” Students are looking for any way available to pay for education and for some, the best advice may be to wait until they are in a better place financially to begin college. With the new rules for financial aid availability and length of time aid can be received, more financial counseling should occur with students. Rather than just focusing workshops on filling out the FAFSA, the sessions should focus on all options for paying for college as well as the reality of paying for college and living at the same time.

• Explore a student advising model that would use cognitive and non-cognitive factors to assist students in determining their college readiness and likelihood of success at Hillsborough Community College.

Research indicates that both cognitive and non-cognitive factors can impact the success of a student in college. Many of the students applying to Hillsborough Community College place in developmental classes and they may or may not enroll in them. Not enrolling in the developmental classes will generally impact the students’ overall chances of success. But the non-cognitive factors – transportation, childcare, employment, etc., or lack thereof
can have a large impact on today’s community college students. By developing a more intrusive advising model that allows a student to understand how all these factors can impact their success or failure in college, will provide the students a better chance of persisting. This will require more time with the new students and should occur in the application process – not waiting until they have registered.

- Increase the marketing and promotion of the availability of the academic support services in the first semester of the students’ attendance.

Although only 15 percent of the non-returning students left because of grades, non-cognitive factors (or life), like missing a class because of no childcare, ultimately impacts the student’s grade in the class. In interviews with personnel at the College, the early warning system for low grades was described as a system that may not be in full operation. The College’s early alert needs to take into account missed classes and not rely solely on mid-term grades. For many students, the mid-term is simply too late to pull out of a downward grade spiral. In the research of the non-returning students, for those with academic issues, only a few used the academic support services. The College needs to actively market the academic support services to current students with direct mail, email, and classroom visits, if possible. The earlier in the semester the services are known, the easier it will be for the students to take advantage of the services. But the early alert system at the College needs to also push the students toward the services at the first sign of difficulty. Another way to focus on the students who may be in more need of the academic support services is to identify the students who placed in developmental but did not follow through and enroll and a direct mail campaign about the academic support services be directed at this group.

- Provide access to online or phone support services during hours other than 8am to 5pm Monday to Friday.

When comparing the returning students with the non-returning students, the non-returning students were more likely than the returning students to attend classes at night and on the weekends – or times that support services may not be available to the students. Provide online access to services at night and on the weekends to provide support to the students.

CONNECTIONS
A majority of the non-returning students did not really connect with anyone at Hillsborough Community College – unless they had a problem. They were most likely to connect with staff but generally to resolve issues or enroll, and they also connected with their classmates – academically
and socially – outside of the classroom. The students actually had the least interaction with faculty outside of the classroom.

• Create a faculty-driven task force at the College to explore ways the College can connect with their students on-campus.

A major issue in retaining students is having the students connect with someone at the College – especially faculty. Faculty are key in building confidence and in turn assisting the students in achieving their goals. But in the research, very few of the non-returning students connected with faculty outside of the classroom. Faculty inviting students to coffee after a class for a discussion may assist in connections. Hillsborough Community College needs to brainstorm ways the faculty and staff can assist in making positive connections with students. A task force composed of faculty and staff should be developed to work on new ideas. This cannot be an administrative task force – there has to be initial buy-in from faculty and staff and the project has to be driven by faculty and staff.

RE-ENROLLING STUDENTS
The good news for Hillsborough Community College is that the majority of the non-returning students chose Hillsborough Community College as their first choice college and the majority of the non-returning students who did not attend another college after leaving HCC, do plan to return. The types of activities that should occur to encourage this re-enrollment include:

• Utilize faculty and staff for a Phone-A-Thon to assist in contacting the current students not enrolled during a semester to encourage their re-enrollment.

Run an MIS report during the registration process for Spring semesters to identify those first time students who have not yet enrolled for the Spring semester. Create a script for the faculty and staff to call the students (and potentially email as well) who have not yet enrolled. Capture the students prior to them leaving and encourage them to enroll for the upcoming semester. If needed, the script should include a push for the students to make appointments with advisors for the upcoming semester.

• Develop a high-impact direct mail marketing and recruiting campaign (oversized postcards and email support as well) aimed at the non-returning students for the last three years and encourage them to return.

More than half of the non-returning students did not attend another college after attending Hillsborough Community College and a major percentage of those students noted they would
consider returning to Hillsborough Community College for courses. Utilize direct mail postcards with a landing page targeted for non-returning students, for example a URL may be www.hccfl.edu/welcomeback, and create a checklist of things on the web site that a returning student needs to know to re-enroll. Explore a fast enrollment process for the returning students and even a priority registration.
BUILDING A BRAND PLATFORM

Hillsborough Community College was interested in identifying and strengthening their brand using a data-driven approach to develop strategies intended to have a positive long-term impact on enrollments, business partnerships, and fundraising capabilities. The College also wanted to establish a brand identity that will unify its multiple campuses and maintain their unique identities and illustrating their connection to their local communities.

An institution’s brand is much more than the logo and the colors. Messaging is critical to moving constituents to action. And when it comes to an institution’s brand, perception is reality. There is no more powerful influence on a college’s reputation than the associations made by its relevant audiences – associations that are then shared with others. More than any advertisement or piece of marketing collateral, this kind of word-of-mouth communication – whether accurate or not – drives public impressions of an institution and those associated with it.

INTERNAL ASSESSMENT

A first step in developing a brand platform is to understand how the institution’s key audiences currently perceive Hillsborough Community College and what motivates them to engage – and continue to engage – with the College. This is accomplished through interactive brand workshops complemented with findings from existing institutional research conducted with students and recent graduates, and external surveys of the community and high school students. The brand workshops engaged members of the College’s key audiences in pulling out themes and messages relevant to target markets. CLARUS’ brand strategist conducted 20 interactive brand workshops with 167 internal and external stakeholders September 25-27, 2012.

These interactive workshops were used to engage the members of the College’s key audiences to identify themes important to brand identity and promises. Workshop participants and survey respondents were asked to think about four general areas that define current perceptions and aspirations for the College:

- Descriptors of the College with the particular market (both positive and negative)
- Unique strengths of the College with the particular market
- Promises made by, points of pride, and misperceptions about the College
- What the College should be known for in five years (aspirations)

During these workshops, participants were asked to generate words and phrases that best describe Hillsborough Community College: what it is known for today, what misperceptions might exist, and what they would like the institution to be known for in five years. They were asked to define the unique strengths of the College, discuss the icons and images that describe the College, and to
define the competition for the College. From these activities in the brand sessions emerged an informative snapshot of the institution today – its strengths, its challenges, and its opportunities for distinction. Several strategic and operational themes emerged during this initial qualitative research process:

- Traditional community college stigmas and traits apply here, too. Not unexpectedly, the concepts of “not a real college,” “13th grade,” and other perceptions that Hillsborough is of less quality than a four-year institution are frustrations felt here, as at most community colleges across the country. Other traditional traits assigned to community colleges – close, affordable, accessible – are recognized as strengths of Hillsborough. The challenge is to dig deeper and uncover unique distinctions that can tell the College’s story in a more powerful way and position it uniquely against its competitors.

- Disconnect between the campuses and system office is counterproductive. One workshop participant summed it up as “The system office is in a different world.” Questions were raised if system staff truly understood what is going on day-to-day on each of the campuses. This disconnect is causing great frustration among staff and faculty. It is also leading to “work-around” solutions to manage the realities happening on individual campuses. Inconsistent policies and processes were mentioned in nearly all of the brand focus sessions as a significant problem and are in direct conflict with the College’s desire to be seen as “one college.”

- Competition between campuses causes divisions. The unique personalities of each campus are evident from initial contact. Each focus group was inherently proud of the campus they were a part of. Several times individuals cited “We are so much better than X campus.” This competitive mentality at work is divisive and makes the “one college” philosophy more difficult to attain. The differences need to be embraced as a positive for the system as a whole – not pointed out as a negative for individual campuses.

- Hillsborough Community College is seen as a part of Tampa. Hillsborough Community College is seen as an integral part of the community. Almost every participant in the workshops could name a favorable way in which he or she had interacted with the College (outside of enrolling as a student). This affection, however, does not always translate into specific actions desired by the College – enrollment, financial support, positive reputation, referral, etc. Hillsborough was consistently described as “Tampa’s best kept secret.”

- Customer service issues. A common theme throughout all of the brand sessions was a lack of customer service. One participant stated “you might stand in line for hours if you can’t
do it online.” Issues with Financial Aid processes were mentioned significantly. It was also noted that different campuses provide different levels of service.

- Transition to USF was seen as a positive. Transfer to University of South Florida is seen as huge positive for Hillsborough. It makes a bachelor’s degree attainable for its diverse student population.

- Lack of communication. Workshop participants noted a lack of internal communication between the System, College, faculty, staff, and students. One described it as “the left hand doesn’t know what the right hand is doing.” The desire for consistent, frequent, and meaningful communication was a common theme. External communications and messages had very little recall. Participants wanted to hear more about the College in the community.

COMPETITIVE OVERVIEW
A crucial element in crafting a successful brand platform is to identify those qualities and offerings that an organization can claim are distinct from its competitors. This represents a real challenge for community colleges, which are founded upon a philosophy of accessibility and inclusion. It is much easier for a selective institution to develop a brand platform based on a superlative – i.e., a claim that we are the best or only institution in a certain geography, category, or academic discipline – than it is for a community college to do so. Therefore, it is much more important for Hillsborough Community College to understand the market positions claimed by its competitor institutions as it seeks to identify a market niche it can “own.”

The competitive arena for two-year colleges is not limited to other institutions. Because of the open-access mission and the complex nature of the markets they serve, two-year colleges find themselves in greater competition with external forces beyond their control that affect students’ ability to attend or remain in college, as well as misperceptions in the marketplace that are difficult to correct. Brand messaging should attempt to dispel misperceptions, offer alternatives or solutions to external forces, and distinguish the College from neighboring two- and four-year competitors.

As one of the primary search tools used by today’s potential students, a college website should clearly convey the institution’s strengths and points of distinction. The websites of 15 of Hillsborough Community College’s closest competitor institutions (by location and identification during research) were scanned for clear identity markers, an obvious tagline, brand or institutional message, and claims of distinction/ strength. Additional perceptions about these competitors generated during research are also reviewed.
After a comprehensive review of Hillsborough Community College’s competitors, many former community colleges have changed their names to reflect being a state college. The College’s commitment to remaining a community college is a noteworthy distinction. The community college mission also positions the College as an asset to Hillsborough County that area four-year and private schools cannot replicate.

DEFINING THE HILLSBOROUGH COMMUNITY COLLEGE BRAND

Defining a college brand is a complex process. It is an interpretation of the college’s mission, vision, and strategic goals, informed by external and internal research identifying attributes, strengths, and perceptions meaningful to the college’s key audiences. This is then interpreted through the lens of internal realities and aspirations, external perceptions, competitors’ positioning and identities, and regional characteristics the College embodies. The College’s brand is a result of that analysis. To be both authentic and inspirational, the brand should:

- Align the College with the economic profile and goals of the service area
- Reflect the nature and character of the regional population
• Convey an active and leadership role for the College in determining the economic vitality of the region and its people
• Suggest a desired outcome that reflects all of the above
• Distinguish the College from its peers

The brand is expressed through strategic language: a competitive advantage or positioning statement, a set of institutional marketing messages, and, often, a tagline. This language serves as a guide for tactical expressions and implementation.

POSITIONING STATEMENT
A good positioning statement provides a clear description of an institution’s distinctive strengths and offerings as clearly and concisely as possible. It is the most precise expression of what the institution does better and differently than its competitors. A positioning statement describes the essence of the institution by emphasizing the institution’s strengths in a way that is authentic and aspirational. A sign of its success is when key audiences immediately associate the desired distinction with the institution whenever they hear its name.

Unlike a mission statement or tagline, a positioning statement is not intended to be shared with the public. Instead, it serves as the touchstone for internal strategy and marketing, providing a framework for how the College will shape its programming and then communicate that to its constituents. While the positioning statement is not meant to be communicated word for word, the concepts and ideas in the statement shape the marketing messages that are communicated externally. It states what the institution will deliver to its constituents in terms of educational experience and desired outcome.

Hillsborough’s competitive positioning is based on its unique situation in the Tampa Bay area. By sheer size alone Hillsborough has a powerful presence in the community, as an employer, community partner, workforce supplier, and educational leader. Hillsborough was consistently identified as a provider of academic excellence by internal audiences, but the perception is not as strong externally. Diversity was used to describe not only the student population, but staff and faculty, course offerings, and locations. A common aspiration among all campuses was a desire for unity and consistency, while maintaining their unique identities. When combined with the mission and vision statement, the College can position itself unlike any other institution in the area.

The Hillsborough Community College Positioning Statement

_Hillsborough Community College is a vital community partner, empowering students to improve their lives and their communities through rich learning opportunities in its diverse environments._
The key concepts in the statement reflect research findings and institutional aspirations:

- **Vital community partner** – emphasizes the importance of Hillsborough Community College to Hillsborough County and its broad impact in the community
- **Empowering students** – embraces the idea that the College provides students the tools necessary to move forward
- **Improve their lives** – identifies the ultimate outcome for the students
- **And their communities** – provides a long-term benefit to the community of a locally accessible education
- **Rich learning opportunities** – embraces the College’s commitment to provide high quality programming – academic as well as workforce based
- **In its diverse environments** – embraces the diversity of the College at all levels and the unique campus environments offered

**KEY MESSAGES**
The positioning statement states “what we do better;” the institutional marketing messages explain “how we do it.” These messages are the heart of the brand platform. They are developed by tracing the themes that emerge from the combined analysis of current perceptions, internal aspirations, and operational realities. They describe current truths (authentic) or represent attributes the College is working aggressively to embody in the near future (aspirational). Each message is an umbrella, conveying a single theme critical to the College’s overall operation. This also allows for supporting “evidence” (i.e. specific programs, statistics, partnerships, etc.) to demonstrate or prove the relevance of the message to a specific audience or campus.

Marketing Messages to Support the Positioning Statement

- Hillsborough Community College has a powerful connection to the community.
- Hillsborough Community College is one college offering diverse campus environments.
- Hillsborough Community College offers outstanding career training that supports the economy of the community.
- Hillsborough Community College empowers students.
- Hillsborough Community College embraces innovation and technology.
- Hillsborough Community College provides excellent and challenging academics.

**THE TAGLINE**
A tagline is a creative, memorable expression of the institution’s mission and brand. It translates the internally focused competitive advantage statement into an external phrase or slogan that
The tagline suggested for Hillsborough Community College is: The Power of Community.

Rationale for this tagline includes:
- Describes the powerful impact HCC has on the community
- Describes how HCC empowers its students
- Embraces the word “Community” as a focus of pride – while many schools are changing their names to State College
- Since “HCC” is how the school is referenced, it ties the word community to it
- Connects the college to the community
- The power of a degree or training from HCC
- Internally, illustrates the power of working together

BRAND AND VISUAL IDENTITY GUIDELINES
A strong visual identity is essential to communicating a unified and consistent college image in the community – a constant reminder of what Hillsborough Community College represents. These guidelines set the standard on how the College can communicate clearly and professionally with all aspects of its constituency. Consistency strengthens the message and sends a signal that Hillsborough Community College takes pride in its standards of quality. It will also help the College communicate its mission with one voice. These standards were developed for application to all printed and electronic materials including signage, marketing and promotional materials, email, letterhead, and business cards.

To fully support the brand of Hillsborough Community College, the visual identity – the logo, word marks, and color – must be used consistently by all aspects of the College. After examining all the marketing materials used across the institution by various entities, observations are made for strengthening the visual identity.

Color
Color is the most recognizable element of identity and evokes immediate recognition of a brand or organization. Market segments can react to a color even faster than a logo for some organizations.
Color evokes emotion and is more easily remembered than words. Hillsborough Community College is currently using a deep navy blue, sea blue, and gold. The sea blue isn’t unique in the marketplace, and it’s recommended that the College minimize the use of this color or drop the third color altogether. Greater care must be taken with ownership of this signature color scheme. The colors used in the marketing efforts of Hillsborough Community College need to be the official colors – period. The official colors need to dominate and be predominant on every significant external piece focused on student recruiting (all audiences, fundraising materials, stakeholder communications, and general brand awareness).

Logo
The official Hillsborough Community College seal is being used in conjunction with block lettering as the college’s logo. There is also a secondary logo being used, which spells out Hillsborough Community College. There are different logo and color combinations at different campuses. Sub-brands such as the Institute for Corporate and Continuing Education are utilizing the seal with a different lettering. Our recommendation is to develop a true logo that does not utilize the official college seal. The seal should be reserved for official documents only. Since the College is predominantly known as “HCC,” a new logo should embrace that existing terminology and graphically highlight the “C” for community. The new logo should also allow for sub-brands to consistently identify themselves with the College.