



**Council for Christian
Colleges & Universities**

CCCU 2009 NOEL-LEVITZ MARKET RESEARCH

Executive Summary

*Council for Christian Colleges & Universities
Washington, D.C.*

Noel-Levitz
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Executive Summary

Council for Christian Colleges & Universities • Washington, D.C.

Introduction

In 1986 and 2000, the Council for Christian Colleges & Universities (CCCU) conducted market research to assess its member schools' position in the marketplace and the accompanying opportunities and challenges related to student recruitment. These research topics were revisited – and new areas explored – in a comprehensive market study conducted during 2009 by Noel-Levitz, a market research and enrollment management firm. Over the course of eight months, 12 separate research studies were fielded and two market analyses were completed using secondary data and predictive modeling technologies.

This executive summary captures the highlights and themes that emerged from the research findings. It paints a picture of a group of schools that faces new challenges, such as a shift away from emphasis on the uniquely Christian college choice factors by matriculants, as well as great opportunities in terms of improved understanding of student expectations and the potential of untapped student markets.

We encourage the CCCU membership to take time to read and discuss the research findings, as they hold up to Christian colleges and universities a full and rare image in a marketplace “mirror.” While the core mission of CCCU institutions will never change, its members must continually evaluate how they intersect with the marketplace in order to remain relevant and compelling.

We thank the 56 CCCU institutions that supported this project both financially and by providing many of the research lists essential to the research plan. Special thanks to the CCCU market research team who walked alongside us during this project, contributing their time, ideas and feedback: Nate Mouttet, Vice President for Communications, CCCU; Tom McWhertor, formerly of Calvin College and now Director of Constituency Relations for the Christian Reformed World Relief Committee; John Chopka, Vice President for Enrollment Management, Messiah University; Eric Fulcomer, Vice President for Enrollment Management and Student Life, Bluffton University; Rich Grimm, Vice President for Enrollment Services, Union University; Dave Layton, Dean of Undergraduate Enrollment, Geneva College; Joyce Luy, Dean of Admissions, Westmont University; Rose Smith, Associate Vice President Enrollment Services, Northwestern University; and Scott Shoemaker, Associate Vice President for Enrollment, Point Loma University.

Research Components

This wide-ranging market research project created a 360-degree view of awareness, perceptions, and expectations of Christian colleges and universities. The following survey audiences and secondary research components were included in the project:

1. Undergraduate inquirers
2. Parents of undergraduate inquirers
3. Matriculants and accepted non-matriculants
4. Prospective transfer students
5. Non-inquirers (prospects)
6. Current undergraduates at CCCU institutions
7. Faculty, administrators, and staff of CCCU institutions
8. Young alumni (past 10 years)
9. Parents of young alumni
10. High school guidance counselors
11. Church and youth leaders
12. Academic program demand study
13. Competition analysis
14. Predictive model of inquiries compared with non-inquiries

Individual reports were written for each of these research elements and are available to CCCU schools that underwrote this project.

Project Goals

While the goals for this project were numerous, the key objectives were summarized as a desire to:

- Understand the alternatives students and their parents are considering in the college choice process;
- Understand how Christian colleges and universities are viewed in the competitive context;
- Understand in greater detail the profile, attitudes and beliefs of students at all stages of the enrollment funnel: prospect, inquiry, applicants, and enrolled students;
- Understand the primary ways in which non-matriculating students differ from those who choose to enroll;
- Identify the most important features and benefits that students are seeking in a college or university;
- Explore how students view specific characteristics of a Christian college education; and

- Understand the nature of students who fit the profile of a CCCU student but who have chosen not to inquire.

Ultimately, this research is intended to support more effective recruitment efforts by CCCU schools in a way that maximizes the match between student and institution.

Research Themes and Highlights

Driving Decision Factors

Regardless of the funnel stage, the research showed that four decision factors dominate students' thought processes in the current environment:

- The quality of the academic program or major a student is interested in
- Preparation for future careers
- Faculty who are excellent teachers
- Faculty who are well qualified in their fields of study

Therefore, initial communications to prospective students early in the recruitment process should focus on quality of academic majors, career preparation, and faculty – and communications at later stages should present the more specifically Christian aspects of a school. As students move through the subsequent funnel stages, the percentage of students rating the following items high in importance *increases*:

- Christian life and community
- Integration of the Christian faith and learning
- Christian faculty
- Faith commitment of fellow students

Concerns about college costs remain about the same from the prospect through the admit stage. But CCCU matriculants rank total cost much lower in importance than do students earlier in the funnel – in part because they have now made the commitment to paying for a private education. Overcoming concerns about affordability will be crucial to lowering the barrier between admission and matriculation.

Reasons for Choosing a Christian College or University

Overall, prospects and inquiries say that the most compelling reason for specifically choosing a Christian college or university is that college is a time when students choose their profession and career direction, revealing a very pragmatic angle on the value of a Christian education. Students at the prospect and inquiry stage are much *less* likely than students at the admit stage to be motivated by opportunities to (1) study their major in the context of the Christian faith, (2) seek an environment where their personal faith is connected to learning and life, and (3) see the value of choosing a college because of its impact on the formation of their faith. Yet these are the three reasons most often cited by matriculants as reasons for attending a college or university with a Christian character.

Interestingly, prospects and inquiries are more likely than matriculants and non-matriculants to say that a compelling reason for choosing a Christian college is to reinforce the faith foundations established by their families. This may indicate that students at this early stage of college choice are including some Christian schools on their list at the encouragement of their parents. If so, an

early stage communication to parents of prospective students and inquiries that speaks to this desire may be effective in building CCCU member inquiry and applicant pools.

CCCU alumni are most likely to regard the opportunity to study their academic major in the context of the Christian faith and being able to connect learning and life the top reasons for attending a Christian college. It was shown to be less important to alumni but the results show it was more important to their parents for faculty and staff to serve as Christian role models.

The Primacy of Academics

Of 17 college choice factors, “Quality of the academic program you are interested in” received the highest ratings by both matriculants and non-matriculants. *As a category, academic items overall carried the most influence in college choice.* Career preparation and quality of major increased significantly in importance over the 2000 CCCU matriculant study.

Non-matriculants also tend to consider quality of academic facilities and preparation for future careers as part of the total academic package, while the matriculants do not, suggesting that a stronger emphasis on these two items will be necessary to yield more enrollees.

And while faculty are key, specifically *Christian* faculty – a feature touted by many Christian colleges and universities – ranked last of the 17 items inquiries and their parents were asked to rate. Both students and parents were more interested in faculty teaching abilities and qualifications than in a faculty member’s specific faith commitment as a stand-alone factor.

Familiarity with Christian Colleges

A surprisingly large subset of inquiries and their parents (43% of students and 39% of parents) say that their familiarity with Christian colleges is very limited – they are either not at all or only slightly familiar with Christian colleges and universities. This is nearly the same percent of inquiries in 2000 that indicated a low level of familiarity (the question was not asked of parents). Christian colleges and universities need to assume that this group requires a basic education in the nature of and advantages provided by Christian institutions.

Only one in five of students identified as non-inquiring prospects is at least “quite familiar” with Christian colleges and universities. Yet it is clear that these students do have specific perceptions or misperceptions about Christian colleges.

While about a third of high school guidance counselors said they were very familiar or somewhat familiar with CCCU schools, the vast majority say they are either not very familiar or not familiar at all with CCCU schools.

Preferred Christian College Environments

The relative preference for specific types of Christian college environments remains largely the same regardless of the funnel stage. However, there were marked differences between CCCU matriculants and non-matriculants on several college choice factors related to a Christian college environment. Unlike matriculants, non-matriculants tended to prefer an environment where chapel is offered but attendance is not required and students are not required to sign a statement

of faith. In addition, significantly fewer non-matriculants were interested in required religion or theology courses.

Key reasons for Choosing a Christian College

Inquiring students chose the fact that college is a time for choosing a career direction as the most compelling reason for considering a Christian college.

This emphasis on the importance of choosing a career was even more pronounced when neither of the student's parents had attended a Christian college. It will be important for CCCU schools to be able to clearly articulate how they facilitate the career choice process – not in generic or abstract terms but through specific programs and services. "Preparation for your future career" had a fairly sizeable gap on the young alumni survey between expectations and satisfaction, and so this area likely represents a significant challenge for many schools.

According to matriculants, the most compelling reasons to attend a Christian college are:

- Students can study their major in the context of the Christian faith.
- A Christian college or university environment ensures that personal faith is connected to learning and life.
- The college and university years are a significant time of faith formation.

Non-matriculants chose the same three factors, but at lower percentages.

Many parents of alumni expected that when they sent their son or daughter to a Christian college, the environment would reinforce the faith foundation established by them in their homes. Integration of faith and learning was also a key expectation.

The Shape of Today's Competition

CCCU schools lose applicants to private colleges and universities and to public four-year institutions at roughly the same rate.

Thirty-eight percent of admitted students who do not enroll at one of the CCCU participating institutions enroll at another private college or university; they are most likely (28%) to enroll at *medium-sized* private four-year institution.¹ CCCU lost admits are more likely in general to enroll at another private college than are typical U.S. students.

Most of the lost admits who chose to enroll at another four-year private college chose a college with a religious affiliation. Eight percent chose another CCCU institution which did not participate in this study. Nine percent of the non-enrolling admits chose to enroll at a four-year

¹ For private colleges and universities, a small institution is one with enrollment of less than 1,000 full-time undergraduates; a medium institution is one with enrollment between 1,000 and 2,999 full-time undergraduates; a large institution is one with enrollment of 3,000 full-time undergraduates or more. For public colleges and universities, a small institution is one with enrollment below the average for four-year publics in the state; a medium institution is one with enrollment above average size for schools in the state; a large institution is the institution in the state with the largest enrollment.

private college with no identified religious affiliation. An additional six percent of the non-enrolling admits chose to enroll at a college or university with a Roman Catholic affiliation: Roman Catholic represents the single largest segment of competitors with an identified religious affiliation.

State universities also continue to be tough competitors for CCCU schools. Thirty-eight percent of non-matriculants are attending a four-year public institution. About half of inquiries and half of parents of inquiries indicated that a four-year state university was their first choice in terms of institutional type.

Twenty-one percent of lost admits enrolled at a community college. However, the typical U.S. student enrolls at a community college at twice this rate; thus, we would suggest that community colleges are not a dominant competitor for CCCU students.

Nearly a third of the non-enrolling admits chose an institution where the 2008 – 2009 tuition and fees charged was at least \$20,000. While we can not access information on financial aid awarded to these students, it is likely that many received some amount of gift aid to reduce their net costs. That said, a substantial portion of CCCU's lost admits show a willingness to consider institutions with a high sticker price.

For Inquiries: Majors, Faculty, Careers and Financial Aid

Many inquiries and their parents have limited familiarity with Christian colleges. In addition, inquiries attending public high schools were less likely to value the choice factors based on Christian values such as Christian life and community and integration of the Christian faith and learning.

About half of inquiries and half of parents of inquiries indicated that a four-year state university was their first choice in terms of institutional type. Only eight percent of students in the inquiry pool and nine percent of parents are singularly committed to attendance at a Christian college or university.

While the order of priorities shifted, there was a high degree of overlap in choice factors between the 2000 and the 2009 studies:

Inquiries: Top five college choice items in order of importance

Rank	2000 (statements in parentheses show 2009 re-wording of items)	2009
1	Value of education (Return on your investment in your education)	Quality of the academic program you are interested in
2	Preparation for future careers	Faculty who are well qualified in their fields of study
3	Quality of major (Quality of the academic program you are interested in)	Faculty who are excellent teachers
4	Quality of faculty	Preparation for future careers
5	Availability of financial aid/scholarships to meet need	Availability of financial aid/scholarships

Academic items – including the quality of academic majors and faculty – topped the list of decision factors for both students and parents. Items specifically linked to a Christian environment – e.g., faith commitment of fellow students, integration of the Christian faith and learning, and Christian faculty – tended to be ranked lower by both groups.

Inquiring students chose the fact that college is a time for choosing a career direction as the most compelling reason for considering a Christian college. Nearly 60 percent of inquiries indicate an interest in pursuing graduate study following the achievement of a bachelor's degree; this is identical to the 2000 CCCU study finding.

Parental Influence

Top college choice factors for parents of inquiries were similar to the 2000 study: Quality of the academic program a student is interested in; faculty who are excellent teachers and are well qualified in their fields of study; graduates of the school get good jobs; and quality of academic facilities.

Parents rated their influence on the college choice process as more significant than the students did. Parents were more likely to view themselves as very influential in the college choice process, as having helped with test preparation, and as steering their son or daughter toward a certain college or university. Given this, parents expect to be acknowledged and communicated with, even as early as the inquiry stage.

Parents in a household where one or both parents attended a Christian college are not necessarily rating Christian institutions more highly on the things that matter most to them. They do rate Christian colleges higher on return on investment, close contact with faculty, and any item with a specifically Christian component. *But these same parents did not rate Christian colleges more highly than state colleges or universities on key items of importance such as academic quality, faculty teaching, career preparation, and overall reputation.*

At the same time, the CCCU alumni survey showed that 35 percent of alumni gave a lukewarm or negative response to the question: Would you recommend your undergraduate college or university to your own son or daughter? The parents of inquiries survey appears to show convergence with this finding – and this lackluster endorsement by many alumni-parents calls for further investigation by the broader CCCU community.

Matriculants and Non-matriculants

There has been a significant shift in the priorities of CCCU matriculants since 2000 as noted in the following chart of ranked items.

In 2000, items related to the Christian environment dominated the choice factors; in 2009 the choice factors revolve around educational outcomes, academics and faculty. This shift reflects a trend toward practicality in college choice by CCCU students.

It also suggests that marketing materials will need to lead with messages on academic quality and career preparation and be followed by benefits of the Christian environment.

Matriculants: Top five college choice items in order of importance

Rank	2000 (statements in parentheses show 2009 re-wording of items)	2009
1	Integration of the Christian faith and learning	Preparation for future careers
2	Christian atmosphere (Christian life and community)	Quality of the academic program you are interested in
3	Value of education (Return on your investment in your education)	Faculty who are well qualified in their fields of study
4	Fellowship with other Christians (Faith commitment of fellow students)	Faculty who are excellent teachers
5	Christian faculty	Availability of financial aid/scholarships

By contrast, the priorities for non-matriculants have significant overlap between 2000 and 2009 on items such as career preparation, quality of the academic major, and quality of faculty.

In fact, the non-matriculant priorities for 2000 look quite similar to the matriculants' 2009 top values, with four of the same items appearing in the top five.

Non-matriculants: Top five college choice items in order of importance

Rank	2000 (statements in parentheses show 2009 re-wording of items)	2009
1	Value of education (Return on your investment in your education)	Quality of the academic program you are interested in
2	Preparation for future careers	Preparation for future careers
3	Availability of financial aid/scholarships	Faculty who are excellent teachers
4	Quality of faculty (Faculty who are excellent teachers/ Faculty who are well qualified in their fields of study)	Faculty who are well qualified in their fields of study
5	c) Quality of major (Quality of the academic program you are interested in)	General academic reputation of the college/university

An analysis of the Christian environment preferences showed that non-matriculants were more likely to be seeking institutions that did not have explicit behavioral expectations such as chapel attendance and required religion courses. The large number of admitted students fitting this "don't fence me in" profile – including many students for whom a Christian environment was named the least important factor in their college choice – suggests that there is a disconnect between a sizable segment of students that CCCU schools are attracting and ultimately admitting and the character of such schools. This group represented about 25% of the surveyed admitted student population. This tendency to devalue some expressly Christian factors is underscored by the 2008 National Study of Youth and Religion which reported "relatively small but consistent decreases in conventional religious beliefs and practices" by U.S. teens.

Along the same lines, the CCCU research data showed that church attendance increases from prospect to inquiry, from inquiry to non-matriculant and from non-matriculant to matriculant.

Matriculants were more likely than non-matriculants to report attending church more than once per week.

Transfer Students

Just over half of prospective transfer students are coming from community colleges. Four in 10 are only applying to one institution, which means that long before a campus receives an application from a prospective transfer student, she or he already has reached a decision about a first-choice school.

Nearly half say that a Christian college or university is their top choice. But these students will consider other types of colleges, and given their habituation to paying community college tuition rates, the pull of a lower-cost institution can be strong. For those who are seriously considering Christian colleges, many set their sights on a Christian college while in high school or have been encouraged to apply to a Christian college by their friends.

The most important considerations when selecting a school to transfer to are the quality of the intended major, faculty teaching abilities and credentials, and career preparation. While they are interested in Christian colleges, the factors that define a specifically Christian environment are *less important to transfer students* than to other survey populations such as freshman matriculants and alumni.

When deciding on a school, transfer students are eager for detailed information on their intended major and they anticipate that all or most of their credits will be accepted for transfer. Campuses and specific academic programs that hope to serve large numbers of transfer students will need to be flexible in their transfer requirements if they expect to attract this population.

Non-inquiring Prospects

As identified by the Noel-Levitz predictive model, the untapped market potential for CCCU schools is large. While 70 percent of these students do not currently plan to attend a Christian college or university, *more than two-thirds have a reasonable level of interest in a Christian college or university* to consider them as viable prospects for CCCU schools. This is a significant finding that suggests that much broader market outreach is needed on the part of Christian colleges.

Although many are not very familiar with Christian colleges and universities, two of every three have visited the Web site of a Christian school. This is remarkable since it indicates that they have taken the initiative, however minimal the effort, to find and browse a Christian college or university Web site, indicating some level of interest in the school.

These prospects are less interested in the specifically Christian characteristics of a school and less than half have rated the specifically Christian characteristics of a college as important in their college search. At the same time, these factors are also among the least important to CCCU inquirers when we consider rank ordering.

Like inquiries, non-inquiring prospects tend to prefer a less conservative environment at a Christian college. At least three of every four of the prospects preferred a type of college where chapel is not required, where students are not required to sign a statement of faith, and where

residence halls are open to visitors of the opposite sex. Compared with students who enroll at CCCU schools, these prospects are less likely to prefer conservative characteristics in a college environment.

Becoming well educated in a variety of subjects is the least important outcome for these prospects. It is also somewhat less important for them than for CCCU inquirers. It may be that a certain segment of these prospects is more specifically focused on professional programs than the typical inquiry at a CCCU school. The stronger focus on career preparation and formation of a life direction is a key characteristic which differentiates the prospect who has not inquired from students who already have inquired at CCCU schools.

The vast majority of these students are planning on a graduate degree. Given the high percentage of CCCU alumni who go on to graduate schools, there are likely strong messages that CCCU campuses can use to demonstrate to these prospective students their track record in placing students into graduate programs.

Prospects expect Christian colleges to be more expensive than do CCCU inquiries. Presumably, as these students become more familiar with Christian colleges they will develop realistic expectations about tuition levels – and it will be incumbent upon member schools to make affordability a key message early on.

Current Students are Satisfied

CCCU students as a group are highly satisfied with their educational experiences, and CCCU schools rate significantly higher in satisfaction than private institutions nationally in many areas.

CCCU demonstrates significant strengths in terms of the educational product it delivers. For example, CCCU students are pleased with the content of courses and instruction in their field. They believe they are experiencing intellectual growth and that there is a commitment to academic excellence at CCCU. These strengths should be promoted heavily in print communications and on the Web.

Students appreciate that their faculty members are experts – “nearly all of the faculty are knowledgeable in their fields.” Faculty members also provide excellent instruction and are available to students. Students also report that faculty know and care about them individually.

Campus safety is rated highly and is an important message to share with parents of prospective students.

Spiritual aspects are also clear areas of strength for CCCU members. Students indicated that CCCU schools are a good fit for them spiritually and that their understanding of God has been strengthened.

CCCU campuses offer a warm, nurturing and fun student environment. Students report that advisors are knowledgeable and approachable and staff members are caring. CCCU institutions show concern for individual students, students feel welcome, and it is enjoyable being a student at CCCU campuses. Also, students report gender equality and respect.

Current students find that CCCU institutions are well-respected in the community and keep their grounds and facilities well-maintained. These findings counter misperceptions that students have to forego reputation or quality if they choose a Christian college.

Where can Christian colleges and universities improve? The following areas received lower ratings:

- Tuition paid is a worthwhile investment
- Issues with class registration
- Financial award timing, amount of aid awarded, and the ability to get help in this area
- Residence hall conditions
- Perceptions of security staff response time
- Timely feedback from faculty about student progress
- Faculty (not) taking student differences into consideration
- Food choice is a common area of complaint among students, especially at smaller campuses.
- Student disciplinary procedures and lack of freedom of expression.
- Runaround related to campus services
- Parking

Faculty, Staff and Administrators' Viewpoint

The Institutional Priorities Survey is a companion instrument to the Student Satisfaction Inventory and is used to compare perceptions and priorities on key campus topics. Faculty, staff and administrators identified many of the same strengths as students.

Four areas that were identified as strengths by faculty, staff and administrators that were not selected by students – suggesting gaps in agreement – were:

- Being on this campus is contributing to students' spiritual growth
- Tuition is a worthwhile investment
- Faculty, administrators, and/or staff are helpful to students in processing issues related to their faith
- Major requirements are clear and reasonable

Areas identified as opportunities for improvement by faculty, staff, and administrators but not receiving comparatively low ratings from students included:

- Adjunct faculty are competent as classroom instructors
- Admissions staff are knowledgeable
- The instruction in major fields is excellent
- The content of the courses within each major is valuable

- Admissions counselors accurately portray the campus in their recruiting practices
- Academic advisors are approachable
- The quality of instruction students receive in most of their classes is excellent

In general, administrators were more likely to give lower rankings to the academic items than were faculty or staff. Campuses need to be concerned with these differences in perceptions because they can contribute to campus climate issues and impact student retention.

Young Alumni Weigh in

Most young CCCU alumni are working full-time; 20 percent are working for a not-for-profit organization. An additional nine percent are either in missions or in ministry. The most common occupations for CCCU young alumni are in business and education.

More than half of alumni are either currently enrolled or have been enrolled in graduate school. While this shows a high level of engagement in furthering their education, it may also be a response to concerns that alumni have about the marketability of their undergraduate degrees which was also revealed in the research.

Alumni had high expectations for career preparation, program quality, and faculty as teachers. While they generally register high levels of satisfaction with the quality of their academic majors and faculty as teachers, they are less satisfied with the level of career preparation they believe they received.

The specifically Christian aspects of their education – Christian life and community, integration of faith and learning, and Christian faculty – received high marks. This is clearly an area where CCCU institutions are delivering high value to their students. Alumni also report that their educations prepared them to communicate effectively, to learn throughout their whole lives, and look at controversial issues from perspectives other than their own.

Alumni register concerns about the cost and affordability – items that are high in importance but relatively low in satisfaction. In part, the lower levels of satisfaction may reflect the fact that many have to manage student loan payments, often while working in relatively low paying occupations such as teaching, ministry, or social work.

Alumni registered lower levels of satisfaction than their parents for the quality of the academic program, quality of academic facilities, and the general academic reputation of the college or university.

On the whole, overall levels of satisfaction are quite high, with about three in four alumni indicating they are either “very satisfied” or “satisfied” with their overall education as well as the education they received in their major.

Parents of Young Alumni

More than 80 percent of parents of young alumni were satisfied with their child’s experience at a Christian college, and the large majority indicated they would “likely” or “very likely” do it over again.

Parents believe CCCU schools delivered in several of the most important areas including quality of academic program, faculty who are excellent teachers, and faculty who are well qualified in their field. Most parents of alumni are also satisfied with the general academic reputation of the college; the quality of academic facilities; and some of the specifically Christian aspects of their child's education including integration of faith and learning and Christian faculty.

At the same time, parents register concerns about affordability and employment outcomes. Concerns about employment outcomes are exacerbated by sensitivity to cost. As many parents watch their children work to pay off student loans or struggle themselves to pay loans for their child's education, they are more likely to wonder whether the cost of education was worth it.

While given high marks by the majority of parents surveyed, 10 percent or more of parents were not satisfied with the teaching ability of faculty; preparation for future career; Christian life and community; integration of Christian faith and learning; and contact with faculty in and out of class.

Parents are willing to make some sacrifices for the added value of faith-integrated learning. Fifty-five percent reported living a frugal lifestyle; nearly 40 percent indicated they had delayed a major purchase; and 31 percent reported a reduction in their overall standard of living. While they undertake these sacrifices, they do have concerns about the level of investment they were expected to make in a Christian education for their child.

While slightly more than half of parents indicated they had borrowed money to finance their child's education, the young alumni survey shows that more students are borrowing to finance their own education. So while a significant number of parents take on debt to pay for a Christian education, many more instead expect their children to assume the burden of student loans.

Role of High School Guidance Counselors

While most counselors work with juniors and seniors, more than half reported also working with students as early as the ninth grade, as high school students plan early to take prerequisite or preparatory classes for college and university admission.

The top criteria for recommending a school are: (1) academic quality, (2) outcomes, and (3) cost. Cost actually was ranked higher in importance by guidance counselors than by parents of CCCU inquiries.

Current "share of mind" for Christian schools is modest but not insignificant. While the majority (60%) of counselors reported that a four-year state university was their students' top choice school, a significant minority (11%) say that a four-year Christian college or university is their students' top choice school. This is more than twice the percentage of counselors who say that a four-year non-religious private school is their students' top choice (5%).

There are generally positive perceptions of Christian colleges and universities. Counselors by and large rated Christian colleges and universities as better or no different than state colleges and universities. They gave Christian colleges and universities high marks for the specifically Christian or faith-related features of these schools. They also rated Christian schools better on several items not relating to faith, such as close contact with faculty, availability of financial

aid/scholarships, and return on a student's investment. These will be important benefits to reinforce with counselors and their students.

A majority of counselors rated Christian schools as worse than state schools on only one item: total cost. Other items receiving relatively lower marks were encountering diverse people, cultures and viewpoints, and quality of academic facilities.

Nearly all counselors reported visiting a college campus at least once per year. During the last three years, about half have visited a Christian college or university campus in their role as a guidance counselor.

Eighty percent of guidance counselors said that they believed college Web sites should have special sections just for them. Even if those sections do not have substantially different content from other parts of an admissions site, this is a strategy for acknowledging the counselor's role and soliciting engagement with the institution.

Impact of the economy is viewed as significant. Most counselors indicate that the economy is changing students' plans. In particular, many report that more of their students are choosing to attend a community college.

Church Leaders

Forty-seven percent of church leaders surveyed indicated that they are either moderately or very involved in the college consideration process of their church members. A quarter said that their churches included college and career planning as part of the educational curriculum.

The majority of church leaders said that they regularly received recruitment communications from colleges and universities. Mailed publications were their top preference for receiving information, but they were also interested in special events for youth leaders and pastors, web site information, and visits to their church or youth group by school representatives.

The items church leaders were most likely to consider when recommending a college or university were:

- Quality of the academic program a student is interested in
- Christian life and community
- Preparation for future careers
- Total cost

Church leaders gave Christian colleges much higher ratings compared with state colleges and universities on all Christian-specific items, and also on close contact with faculty and faculty as excellent teachers. They also rated Christian colleges quite highly on general academic reputation. They assigned Christian colleges the lowest ratings for cost, diversity, and quality of academic facilities.

More than half of respondents had attended a Christian college or university for their own education and a one-fifth had attended a four-year state university, the next highest category.

While almost all said they were somewhat or very familiar with Christian colleges and universities in general, only about a quarter said they were somewhat or very familiar specifically with the Council for Christian Colleges & Universities. This points out a significant need and opportunity to raise the profile of CCCU among church leaders.

Racial/ethnic Diversity Differences

The target population has become more diverse: 75 percent of non-matriculants and 81 percent of matriculants identified themselves as white in this 2009 study compared with 86 percent of the non-matriculants and 89 percent of the matriculants in the 2000 study.

At the same time, non-white students may not resonate with the same language and terminology as white students. Non-white matriculants were less likely to identify with the phrase “born-again Christian” more likely to identify with the phrase “progressive Christian.” In addition, non-white matriculants were more likely to view Christian colleges as having weaker academics than were white matriculants.

CCCU schools may have work to do in order to create a more positive culture for diverse students on their campuses. In terms of current student satisfaction, *non-white students rated their satisfaction with their overall experience lower than white students and were less likely to indicate that they would make the same choice again.* The Student Satisfaction Survey report provides more detail on the perspectives of non-white compared with white students for specific topics.

Encountering and appreciating diversity appear to be educational outcomes that need attention from the alumni perspective as well. CCCU alumni are less than satisfied with their ability to relate well to people from other backgrounds. In fact, parents of alumni are more confident that their son or daughter can relate well to people of different backgrounds than the alumni themselves are. In open-end comments about what they would change regarding their undergraduate experience, many CCCU graduates implied that they expected a more diverse student body than what they actually encountered.

Non-white young alumni were somewhat less likely than white alumni to say they would make the same undergraduate college choice all over again, although both groups rated their satisfaction with their overall undergraduate experience as well as their academic major about the same.

Although this item was significantly more important to them, non-white alumni were significantly less likely than white alumni to say that they had the financial resources they needed to live independently and comfortably. Non-white alumni also were significantly less likely to view the tuition they paid as a worthwhile investment.

Demand for Academic Programs

The academic program demand study was intended as a contribution to the overall discussion of CCCU institution competitiveness, **not as a directive for any individual campus.** In this context we looked at the alignment between academic programs offered by CCCU schools and the student marketplace.

Freshmen enrolling at Christian colleges and universities, regardless of whether or not they are CCCU member institutions, are more likely than typical freshmen to be interested in majors in the arts and humanities and in teacher education. In fact, elementary education is the most popular declared major among all U.S. college freshmen and is also a program where a greater percentage of Christian college freshmen have declared an interest than college freshmen in general.

The subject area of business accounts for the greatest number of degrees awarded both at all U.S. colleges and at CCCU member schools in the U.S. In addition, CCCU member schools capture a greater than average share of degrees awarded in business.

Other popular subjects where CCCU schools capture a higher than average market share are the health professions and education. CCCU member institutions produce nearly five percent of all bachelor's degrees awarded in the field of education. Outside theology, philosophy and religious studies, education is the program area where CCCU schools capture the greatest market share.

With relative program strengths in education, business, health professions, religion and theology, and music, CCCU schools are positioned to prepare students for many occupations that are projected to experience above average occupational growth.

The top five programs where either no or relatively few CCCU schools currently award degrees but which are relatively popular nationally are: Aerospace, Aeronautical and Astronautical Engineering; Industrial Engineering; Web/Multimedia Management and Webmaster; Animation, Interactive Tech, Video Graphics and Special Effects; and Construction Engineering Technology/Technician.

Key Recommendations

Key Marketing Messages

The clear mandate for CCCU schools that emerges from the 2009 market research is the need to articulate and document excellence in these four areas:

- The quality of the academic program or major a student is interested in
- Preparation for future careers
- Faculty who are excellent teachers
- Faculty who are well qualified in their fields of study

If they are to keep students engaged during their decision-making process, marketing communications to prospective students throughout the recruitment cycle need to reinforce the value that CCCU schools provide in these areas.

In particular, CCCU schools must be able to individually “sell” each of their majors, not just the broad academic experience. This means clearly documenting faculty teaching skills and credentials, educational outcomes, alumni success, and all of the tangible benefits that students and parents expect from a college education. To do this job well, schools will need compelling data: facts, statistics, and evidence – including a database of information about recent alumni and their successes, student internship and independent study examples, faculty research and professional activities, and other information that will bring majors and programs to life. In short, CCCU schools need to be able to talk with great specificity and enthusiasm about each program and major, as much as program-specific evidence permits.

At the same time that an institution is establishing its academic credibility with students and parents, it can talk about how the Christian faith is vital and integral to the academic fabric and educational experience. But the 2009 research says that Christian community and traditions will not be accepted as a substitute for academic quality.

Inquiries: Finding a Life’s Passion

Because a large number of inquiries and their parents say that their familiarity with Christian colleges is very limited, Christian colleges and universities need to assume that this group requires a basic education in the nature of and advantages provided by Christian institutions.

Inquiring students chose the fact that college is a time for choosing a career direction as the most compelling reason for considering a Christian college. Providing examples and statistics that document an institution’s ability to help students find their life’s “passion” should be part of early response communications. Recruitment communications should show prospective students and inquiries how the Christian environment benefits students as they make career decisions.

Roughly 10 percent of the CCCU inquiry pool indicates a first-choice preference for community colleges, demonstrating the need to keep in touch with this group as potential transfer students if they do not immediately enroll at a CCCU school. This will require tracking the institutions

chosen by non-matriculants in a recruitment database. For example, a campus can send a file of admitted, non-enrolled students to the National Student Clearinghouse and receive back a file that lists each student and the school where he or she enrolled. Students who enrolled at a community college can be placed in a communications flow directed to prospective transfer students.

Sixteen percent of CCCU inquiries indicated that they were no longer interested in attending a Christian college or university and 62 percent said they were interested in a Christian college or university, but are also interested in other types of schools. This underscores the need to be continually grading and qualifying an inquiry pool through telephone contact programs, predictive modeling, and other means to ensure that costly recruitment resources are being focused only on high-potential inquiries and applicants.

The Right Messages for Parents

Parents put an emphasis on the importance of choosing a career, and this was even more pronounced when neither of the student's parents had attended a Christian college. It is important for CCCU schools to be able to clearly articulate how they facilitate the career choice process – not in generic or abstract terms but through specific programs and services. Simply having a career planning office available to students is not sufficient to differentiate Christian colleges; schools must develop proactive programs that integrate with the curriculum and do not depend solely on individual student initiative.

Based on the parents of alumni survey, it is also important for CCCU schools to communicate examples of students strengthening their faith and establishing connections between the elements of their faith and the subjects they study – examples that go beyond prayer before classes.

Alumni were more satisfied than their parents with the close contact they had with professors. This difference is likely due to the fact that as students the alumni were much more in tune with this aspect of their education. Given that parents have some level of concern about the role that faculty and staff play as Christian role models, it would be helpful for campuses to develop communications to parents that feature faculty and staff mentoring students.

Accommodating Transfer Students

Several strategies rise to the top for transfer students:

- Enrollment officers and academic staff will need to work together to ensure flexibility in transfer student requirements and course credit acceptance. A rigid approach that expects transfer students to significantly lengthen their course of studies to meet graduation requirements will not support enrollment growth. Program-specific articulation agreements with key feeder community colleges are essential for academic programs that serve large numbers of transfer students.
- Early outreach to students at feeder community colleges is a key strategy to growing the pool of prospective transfer students, as is using current students to refer former high school classmates.
- While they are focused on career preparation, transfer students also expect that when they finish college they will make a contribution to the world. Unlike traditional-age freshmen,

transfer students have less time in a Christian college environment to grow and develop the skills that will make them Christian leaders. CCCU schools that desire to enroll more transfer students should ensure that there are junior and senior level courses that establish connections across disciplines and provide service opportunities for these students who seek to make a meaningful contribution to society.

Prospects are an Opportunity

The research on non-inquiring prospects suggests a number strategies:

First, schools who do not do an annual search mailing should strongly consider incorporating this strategy into their marketing and recruitment plans. The research illustrated that there are many students each year who do not take the initiative on their own to inquire, but who would be a good fit for a CCCU institution. CCCU schools need to reach out to these students to generate interest.

Second, for those doing a student search program, the search strategy should emphasize career preparation, quality of academic program, and well-qualified faculty who are good teachers. These are the top considerations for nearly all students. To be effective in reaching these prospects, a search mailing should quickly show how the excellent instruction provided by well-qualified faculty at CCCU schools succeeds in preparing students for their future careers.

Only one in five of these prospects say they are at least “quite familiar” with Christian colleges and universities. Yet it is clear that these students do have specific beliefs – both accurate and inaccurate – about a Christian college. Thus, CCCU schools must also be prepared to overcome misperceptions about a Christian college.

Given the high percentage of CCCU alumni who go on to graduate schools, there are likely strong messages that CCCU campuses can use to demonstrate to these prospective students their track record in placing students into graduate programs.

Current CCCU Students

CCCU institutions have much to celebrate regarding the satisfaction of current students. Schools that track this data longitudinally should share successes widely with campus constituencies – and keep people informed about planned improvements.

Because some students have concerns about the value of their educational investment, CCCU schools need to continually “re-recruit” current students. We suggest each campus implement an internal communications plan that regularly highlights recent graduate outcomes and other student and faculty achievements in their fields.

We suggest CCCU schools especially pay attention the length of time to graduate and make every effort to reduce the average. Being able to document shorter graduation times can become a competitive advantage.

CCCU campuses need to assess financial aid issues thoroughly so that communication and processes can be improved. Streamlining financial aid is critical for institutions to thrive during this economy.

Students appreciate variety and late hour options for food service. Some campuses have partnered with local businesses to offer a greater variety by opening additional shops on or close to campus or catering at the café on certain days.

Residence hall conditions are of critical importance as first impressions are formed quickly when students and parents visit campus. While in the past schools could get by with mediocre housing, campus living options have become highly competitive, with apartment-style housing the norm.

Faculty, Staff and Administrators

The Institutional Priorities Survey revealed four areas that were identified as strengths by CCCU faculty, staff and administrators as group but not by students: Being on this campus is contributing to students' spiritual growth; tuition is a worthwhile investment; faculty, administrators, and/or staff are helpful to students in processing issues related to their faith; and major requirements are clear and reasonable. It would be worthwhile for individual campuses to assess and further research their own gaps on these or other campus-specific topics, and facilitate campus discussion groups to increase understanding and to identify factors contributing to differences in opinion.

It would also be valuable for faculty, staff, and administrators to discuss areas with lower ratings from them as a group, but not receiving comparatively low ratings from students – which may include: the instruction in major fields is excellent; the content of the courses within each major is valuable; academic advisors are approachable; the quality of instruction students receive in most of their classes is excellent, and others. Understanding the root of these perceptions or misperceptions is critical to encouraging a positive campus culture, which in turn supports student retention.

Influencing Guidance Counselors

While the influence of guidance counselors is highly variable by high school type and size, in general counselors play a gate-keeping function by recommending college options to students or suggesting that certain schools would not be a good fit.

Keeping guidance counselors informed about financial aid and scholarships at CCCU schools is critical to prevent inadvertent “filtering out” by counselors of students they decide can not afford a private college or university. This is particularly important in the current economy, where guidance counselors believe that more of their students are choosing community colleges.

The research indicates that CCCU schools should consistently work with guidance counselors to provide promotional materials and sponsor college planning events that target the *early* high school demographic, not as an occasional tactic, but as a primary recruitment strategy.

Because the vast majority of counselors surveyed – all from CCCU institutions' own lists – said they are either not very familiar or not familiar at all with CCCU schools, increasing familiarity with CCCU schools among counselors should be a priority for individual schools as well as for

CCCU as an organization. A broad educational campaign by CCCU targeting high school guidance counselors about the benefits of Christian higher education would be a wise investment.

It is important for CCCU schools to consistently invest in effective campus visit programs targeted specifically for counselors and other school personnel. During the last three years, about half of counselors have visited a Christian college or university campus.

A minority of college Web sites today have sections specifically for guidance counselors, and it could be argued that most of the content for such sections would be redundant. Yet 80 percent of counselors wanted Web site sections just for them that consolidated basic information on such topics as admissions requirements, contact information for admissions representatives, scholarship information, application information and forms, advice for counselors to help students attain admission, tuition/cost information, and key dates. Although this information might be available elsewhere, creating such a section acknowledges the role of the counselor, streamlines communications for them, and encourages engagement with the institution.

This will create an increased opportunity for attracting community college transfer students over the next two to three years, or longer depending on the length of the U.S. recession.

Church Leaders

While pastors and youth leaders have less access to high school students than do guidance counselors, they are very open to contact from Christian colleges and are positively disposed toward them.

CCCU members that do not have a systematic, on-going student-recruitment plan directed toward church leaders should invest in one. Schools that do have such a plan should focus their efforts on personalized mailings, events on campus specifically for pastors and youth leaders, and visits to churches and youth groups that have sufficient college-bound high school student populations. Forty-three percent of church leaders and youth pastors also said they would like to see college Web sites with sections specifically for them.

Messages for church leaders should emphasize Christian life and community, but also need to drive home information on the quality of academic majors, career preparation, and the availability of financial aid.

Because almost three-fourths of survey respondents said they were not very or not at all familiar with CCCU as an organization, regular communications from CCCU on behalf of its membership could help establish greater awareness and interest.

Academic Program Offerings

Academic program offering decisions are dependent upon specific institutional capabilities and competitive contexts, but in general we recommend that CCCU institutions actively review their academic portfolios on a on-going basis. In the past, many educational institutions added new academic programs based on an intuitive understanding of the marketplace and on faculty interests. Given the high costs of launching new programs today, that approach to curriculum development is no longer practical. Instead, program planning must be based on market research that measures both student interest and occupational demand. This includes secondary research

such as that provided in this study, as well as primary research with an institution's own prospective students to measure interest in specific program areas.

Conclusion

We commend CCCU and its member for commissioning this study and encourage the integration of its findings into individual marketing and recruitment plans. We trust that this project will have contributed to CCCU's goal of advancing the cause of Christ-centered higher education. By marrying mission with market sensitivity, Christian colleges and universities can achieve true excellence and fulfill their purpose of transforming lives by faithfully relating scholarship and service to biblical truth.

APPENDIX: Research Methodologies

This research project used standard research methodologies within the context of practical constraints such as list availability, validity of telephone numbers and e-mail addresses, and postal mail response rates. Overall, we were very pleased with the sizes and characteristics of the research samples achieved during the project. Below is a brief synopsis of the research approach chosen for each audience.

Undergraduate Inquiries and Parents of Inquiries

We conducted telephone surveys using lists of inquiries for fall 2010 provided by CCCU institutions. Noel-Levitz randomly selected potential respondents from the combined list, with a quota of 200 surveys each for students and parents per U.S. census region (Northeast, Midwest, South, West). Ultimately, we completed 800 student surveys and 800 parent interviews. Samples of this size have a confidence interval of +/- 3 percent.

Matriculants and Accepted Non-matriculants

Online surveys were conducted with lists of matriculants and non-matriculants for fall 2009 using e-mail addresses provided by CCCU schools. We surveyed admitted students who matriculated at CCCU institutions as well as admitted students who did not enroll. In addition to the 401 completed matriculant surveys and 464 non-matriculant surveys, we fielded 101 in-depth one-on-one interviews with 56 matriculants and 45 non-matriculants.

For this study we conducted a CHAID (*Chi-squared Automatic Interaction Detector*) analysis, a decision-tree technique that identifies relationships between variables within a data set. CHAID is a helpful method of summarizing data, and shows the natural groupings of individuals by various defining variables. The result was a profile of key subpopulations within the matriculant and non-matriculant populations.

The quantitative portion of the survey resulted in a confidence interval of +/- 4.9 percent for matriculants and +/- 4.6 percent for non-matriculants.

Prospective Transfer Students

We conducted an online survey using names of prospective transfer students for the fall 2009 entering class provided by participating CCCU members. We received 431 useable responses, which represents a 7 percent response rate based on opened e-mails and a 1 percent response rate of all of the e-mail invitations sent. A sample of this size has a confidence interval of +/- 4.7 percent.

Non-inquiring Prospects

Noel-Levitz conducted an online survey with a sample of prospective, college-bound seniors who had not already inquired at a CCCU institution for fall 2010 admission. The names were selected from the NRCCUA database using the predictive model developed by Noel-Levitz for CCCU. The model was designed to identify college-bound high school seniors who matched the profile

of enrolled students at CCCU institutions. Using the model, the records of all current high school seniors in the NRCCUA database were "scored." We then selected a split sample of 50,000 of the highest scoring names and an additional 50,000 names with the lowest model scores but who had indicated to NRCCUA that they are interested in a Christian college or university.

E-mails were sent to these students to invite them to participate in the survey. We received 505 useable responses, which represents about one-half of 1 percent of the e-mails delivered and 46 percent of the e-mails opened. The sample had a confidence interval of +/- 4 percent.

Student Satisfaction Inventory and Institutional Priorities Survey

To gather data on current CCCU students and faculty, administrators, and staff, we used two nationally normed Noel-Levitz research instruments: the Student Satisfaction Inventory (SSI) and the Institutional Priorities Survey (IPS). The SSI and IPS are the primary focus of the on-going CCCU Comprehensive Assessment Project (CAP), which is conducted biennially.

The 2009 CCCU CAP project included 49 institutions administering the Student Satisfaction Inventory; 20 of these institutions also administered the Institutional Priorities Survey. The surveys were primarily fielded from the last week of October 2009 through the second week of November 2009. A total of 16,616 students completed the SSI and 3,050 faculty, administrators and staff completed the IPS. For the SSI, 24 institutions administered the paper survey, 24 institutions administered the survey online, and one institution administered with a combination of paper and online. For the IPS, seven institutions administered the paper survey and 13 institutions administered the IPS online.

The sample size for the SSI had a confidence interval of +/- 0.8 percent and the IPS sample had a confidence interval of +/- 1.8 percent

Young Alumni

Noel-Levitz conducted an online survey with a sample of alumni from participating CCCU institutions who had graduated within the last 10 years, between 1998 and 2008. Response rates by institution varied, so to minimize under- or over-sampling alumni from specific institutions we targeted additional e-mail invitations to alumni of institutions with low initial response rates. We received 1,496 useable responses, which represented 2.6 percent of the e-mail invitations sent. A sample of this size has a confidence interval of +/- 2.5 percent.

Parents of Young Alumni

Noel-Levitz conducted a mailed survey with a sample of parents of young alumni (graduated within the past 10 years) of participating CCCU institutions. We drew a stratified random sample and received 2,593 useable responses, representing an unusually strong response rate of 22 percent. A sample of this size has a confidence interval of +/- 2 percent.

Guidance Counselors

Noel-Levitz conducted a mailed survey with a sample of high school guidance counselors from lists provided by CCCU institutions. We drew a random sample of counselors stratified by the

four U.S. Census regions. We received 234 useable responses, representing a response rate of 14 percent, slightly better than expected. A sample of this size has a confidence interval of +/- 6 percent.

Church and Youth Leaders:

We conducted a mailed survey with a sample of church leaders from lists provided by CCCU institutions participating in this study. We drew a random sample stratified by U.S. Census region of 3,000 names for the survey mailing.

We received 128 useable responses to this survey, representing a response rate of 4.3 percent. A sample of this size has a confidence interval of +/- 8.5 percent.

Competition Analysis

Noel-Levitz conducted an analysis of students who were admitted to participating CCCU member schools for the fall 2008 freshman class, focusing on the types of schools chosen by the non-enrolling students. Our analysis looked for significant patterns in the school-type choices of these students, as well as geodemographic characteristics of the students themselves that related to their school choices. Our analysis included appended geocoded data such as average household income; information from the National Student Clearinghouse; and school characteristics such as admissions selectivity and size drawn from the Integrated Postsecondary Education Data System (IPEDS) of the National Center for Education Statistics.

Academic Program Demand Study

The academic program demand study was intended to identify the academic programs most likely to be in demand among college-bound high school students that fit the profiles of CCCU schools. For this analysis, we reviewed three sets of data:

- Data on the percentage of freshmen selecting various academic programs at U.S. colleges and universities from the Higher Education Research Institute's (HERI) American National Freshman survey.
- Data on the numbers of bachelor's degrees awarded by program at U.S. colleges and universities from the IPEDS Completions survey conducted each year by the National Center for Education Statistics (NCES). This data enabled calculation of market share for CCCU schools as well as providing measures of the relative demand for programs.
- Occupational projections to the year 2016 from the U.S. Bureau of Labor Statistics, as a forward-looking indicator of types of programs that may experience increased demand in the future.

Predictive Model

Noel-Levitz built a custom predictive model to assist us in identifying students within the NRCCUA (National Research Center for College and University Admissions) database who have high propensity to inquire to a CCCU school. We used the inquiry data submitted by member CCCU schools for the fall 2008 and 2009 entering class, all of the NRCCUA data elements, and

our own appended data to build a predictive model using the Noel-Levitz SMART Approach system.

We then used these models to search the NRCCUA database for students who have high propensity to inquire as well as students who indicate a preference for a Christian college but who have a low probability of actually inquiring. These data were incorporated into our research design for the prospects survey, so that we sampled records from both the high and low propensity groups.