

 CASES FROM THE FIELD

Cross-Campus Robust Retention Initiative: The Vortex Approach

By Perry R. Rettig

Robust strategic enrollment management plans include an integrated focus on student retention. While Piedmont University has seen steady new student growth over the past few years, retention rates had dropped from the mid-70s to an all-time low of 62 percent. Significant and immediate action was necessary. The Retention Vortex was created as a internal communication protocol that pulls together disparate units across the campus with an ultimate result of increasing the retention rate to 77 percent in three years. This article describes the Vortex and other successful student retention initiatives.

There are many stories of college and university closures due to declining enrollments (Rettig 2021). They are more than stories; they are our shared reality. Much of the country has already been experiencing plummeting high school graduation rates (Grawe 2018). States that have yet to experience this phenomenon will not be spared. Bowman (2020) gave a stark reality check: “The freefall of traditional college-age students is already having an impact on higher education and the competition for students will continue to increase and put pressure on universities to prove their value and retain their financial vitality” (21). Indeed, the need for new student recruitment and, particularly, retention strategies are imperative.

The pressures on senior leadership and governing boards appear insurmountable. “Those providing leadership for colleges and universities in the United States are facing increasingly complex and unrelenting challenges that stretch their capacity to understand fully and to respond effectively to what the future may hold, according to Shinn (2020, 20).”

Senior Consultant with the American Association of Collegiate Registrars and Admissions Officers Clayton Smith (and his colleagues) also noted, “Among the most common pressures are decreasing enrollments, decreasing funding, increasing costs, increasing diversity, changing expectations of learners, and changing expectations of employers” (Smith, *et al.* 2020, 33).

A cursory glance at declining high school enrollments might suggest difficult but manageable losses for institutions of higher learning. However, a deeper analysis indicates much more dire problems. Traditional white college-attending populations are showing double-digit declines. Any potentially mitigating differences are made up by near-term growth in underrepresented populations. Miller notes, Gen Z marks the last generation in U.S. history where a majority of the population is white.... Gen Z is so diverse that we don't even recognize diversity" (Miller 2018, 10).

Three concerns quickly emerge from these insights. First, we know these underrepresented populations are less likely to matriculate onto college rolls (Grawe 2018, 24). Second, should they enroll, they are less likely to persist toward graduation (Hamilton, *et al.* 2018, 114). Third, these same populations earn roughly 60 percent total family income of their majority counterparts (College Board 2019) and are typically less prepared for college. By the end of the decade, even these populations show a precipitous drop. The reason for the overall population decline? With the economic crisis—the Great Recession—in 2008–2009, families had fewer children (Bowman 2020, 22).

A description of the current traditional college-attending student is in order. Just who is Gen Z? Each generation is inextricably shaped by its context and era. This fact is no less true for Gen Z—those young people born between roughly the years 1995–2010. These youth saw the international war on terrorism, school shootings, their parents lose their jobs and finances in the Great Recession, racial disharmony, and are living through an international COVID-19 pandemic. Their parents have made decisions for them and have set goals for them. They have grown up with the ubiquitous nature of technology; they are the YouTube generation.

According to reports cited by Schwieger and Ladwig, “91 percent of teens studied have access to a smartphone, 69 percent have access to a tablet, and 90 percent watch YouTube daily” (Schwieger and Ladwig 2018, 46). Selingo (2018, 9) noted these students “reflexively turn to YouTube for information.... [and] many spend more time on their devices than they do in face-to-face encounters.”

Today's students are entrepreneurial, persistent, and self-sufficient. They like to find information on their own rather than turn to others for help (Schwieger and Ladwig 2018, 46). These same attributes make them pragmatic and career focused, especially considering what happened to their parents. They want to know their degree holds value and is relevant and leads to a stable career. In fact, they believe the purpose of college is to get a career. Selingo (2018, 4) explained, “[t]hey will look primarily for academic and co-curricular programs to develop their skills and prospects.”

Finances are always at the forefront of these students' minds. They have witnessed their parents' struggles through both the Great Recession and the COVID-19 pandemic. This has made them “concerned about their financial futures including the cost of college and accumulating student loan debt” (Schwieger and Ladwig 2018, 48). To which Selingo (2018, 4) added, “They shop for a good value, appreciate price transparency, and want to estimate their return on investment.”

Writing for XYZ University in *HR Magazine*, then high school student Josh Miller described the dual nature of Gen Z students. He explained that they like to work independently, wish to be entrepreneurial, and are always “connected,” but they lack, and therefore, “crave” human interaction (Miller 2018, 11). All these compounding concerns just elucidated indicate Gen Z students are coming to today's campuses with more mental health issues and need various support services (*e.g.*, mental health, career services, tutoring), and they want them when they want them—instantaneously (Selingo 2018, 4).

As Gen Z students have a particular career focus and various needs from their professors and support staff, they hold similar expectations of their future bosses. Schwieger stipulated, “Gen Z respondents cited their most important characteristics associated with future employers to include: treating people with respect, ethical behavior, fair compensation and promotion across all employees, open and transparent communication, and wise business decision-making” (Schwieger and Ladwig 2018, 46).

Professor at the University of Illinois Springfield, Vickie Cook, added to this list: this generation “values

rewards that offer more autonomy and freedom [emphasis in original], such as flexible work hours, working from home, online and hybrid approaches to working and learning” (Cook 2021).

Not only is Gen Z dissimilar than its preceding generation, today’s work place has different needs and expectations of them. Boards of trustees and senior university leadership need to understand these workforce demands of today and of the future. The Association of American Colleges and Universities (AAC&U) surveyed CEOs and hiring managers to determine the priorities they are looking for from college graduates. The top six priorities included: oral communication; teamwork skills with diverse groups; written communication; critical thinking and analytical reasoning; complex problem solving; and, information literacy (Hart Research Associates 2018).

In similar fashion, the National Association of Colleges and Employers (NACE) conducted a study of employers and found the top six required skills, in order, were: ability to work in a team; problem-solving skills; written communication skills; strong work ethic; verbal communication skills; and, leadership (Schwieger and Ladwig 2018, 49). Terrel Rhodes cited additional research: “78 percent of business executives say it’s very important that their workers possess critical thinking skills.... 60 percent of hiring managers say they would be much more likely to hire recent graduates who have completed an internship.... 78 percent of executives prefer e-portfolios to express student academic achievements as opposed to transcripts alone” (Rhodes 2019, 8–10).

There are reasons for university and college leaders to be plausibly optimistic about near-term enrollments. In the near term, underrepresented populations, more particularly Hispanic and Asian, are showing potential for enrollment growth. There is an even larger group that has for the most part been untouched, and that is nontraditional students—those over 25 years of age. It should be noted that not all of these students need to attend college in order to complete a degree; many wish to seek smaller credentials. Still, others have varying numbers of academic credits banked to transfer.

There are still other reasons for hope. “Not only is there greater demand for higher education among students of color, but also students from low-income backgrounds, those from rural communities, older adults, U.S. military veterans, and adults with full-time jobs” (Bowman 2020, 23). Further, high school students whose parents have attended college are more likely to attend themselves. This population will increase by 7 percent by the end of the decade according to Nathan Grawe (Grawe 2018, 55).

Along with these encouraging data points, higher education leaders can develop numerous strategies to begin mitigating previously noted concerns. In fact, most of these strategies will likely make their institutions more resilient and even stronger than they have ever been before. At the same time, such strategies often need not be excessively expensive; gone are the days of extravagant amenities—Gen Z care less for them.

Generally, such strategies should focus on both the recruitment and retention of students and can range from the curricular (academic programs and pedagogy) to the co-curricular. Focus will be on emerging student populations, as well as parents, alumni, and employers. Student support services, modest physical plant adjustments, and utilization of new technologies must be considered. New budgeting processes, data management, and financial aid support will benefit students and institutions alike. New community partnerships and student experiences will be essential.

The alternative, of course, is to attempt to maintain the status quo and continue with business as usual. Nathan Grawe told us how to brace for this strategy: “Perhaps, institutions need to prepare for significant staff and faculty reductions within the next 15 years and not simply redesign our recruitment and teaching strategies” (Grawe 2018, 19). Conversely, institutions can break from mimetic isomorphism—the vision of the only way they know how to do things—and create a new lens of opportunity and collaboration.

Emerging recruitment markets and retention initiatives are already established as part of today’s university strategic enrollment plans. Dwindling markets and nascent plans to keep matriculated students, however,

place increasing demands on retention strategies. Robust and comprehensive institution-wide plans are imperative. The kinds of strategies necessary will be those that meet the needs of today's students and those who will be employing them.

Piedmont University has done just that. It has created a robust comprehensive approach to student retention and student success. The Retention Vortex is the vehicle to accomplish these goals through a campus-wide interconnected committee of faculty and staff working together to streamline practices, programs, and policies. This approach is not only supportive of all students but helps to prevent any from falling through the cracks.

The Piedmont University Retention Vortex—A Case Study

The Context

With Piedmont University's freshmen to sophomore retention rates following a perilous negative trend line, it was apparent significant corrections needed to be made. Its first-time, full-time cohort retention rate had plummeted to 62 percent, but it has now dramatically increased in three years to 77 percent with early indications reaching as high for fall 2021.

Like any significant retention success story, Piedmont's approach needed to be comprehensive and reach across the entire institution. The university had been bringing in record first-year and transfer enrollments, and housing was reaching capacity. Yet it was losing nearly 40 percent of its recruitment successes after the first year. Staff and faculty were discouraged and something—some things—needed to change.

Planning

Planning efforts were fueled by an expansive review of the literature, a portion which is described above. Even more, personal surveys of students and their parents provided important direction. When incoming students were asked what worried them most about their first year, the responses were clear. Their primary concerns, in order, were: finances, loneliness, academic rigor, and

career-readiness. Parents' concerns revolved around finances, career-readiness, and academic support.

The Office of Enrollment Management and Student Affairs immediately focused attention on building the necessary infrastructure, support systems for students, improvements to the student life experience, and high impact practices inside and outside the classroom. Perhaps the one initiative that has had the greatest impact for student success was the Retention Vortex. From the outset, the Vortex became the centerpiece for planning efforts.

The Retention Vortex

The Vortex was made up of the vice president of enrollment management and student affairs (VPEM), the VPEM administrative assistant who serves as operational co-chair, the coordinator of student success services, the coordinator of tutoring services, the assistant registrar, director of student accounts, an assistant director of athletics, two admissions advisors, a financial aid advisor, an assistant director of residence life, and two faculty members. Two professional staff members from the university's sister campus in Athens round out the team.

Based upon student feedback, nascent retention data, and a review of the literature, several crucial features needed to be addressed. Of these, primacy needed to be devoted to: student preparation and continued academic support; career preparation; mental health and relational needs; and financial education. The Vortex had its work cut out for it, but the team stepped up to the challenge.

This inter-campus group of professionals has two fundamental foci. The first and primary focus is identifying students who have not registered for classes and to provide them the appropriate support necessary to get registered. The other critical focus is to examine policies and protocols that might not be user-friendly and are in conflict with other policies and protocols and to then streamline and coordinate the varied communications from across divisions to the students. This team was charged to review the needs of the institution's students and make recommendations for the requisite support. The next few pages will speak to the new and strengthened support initiatives born of the Vortex.

Summer Bridge—SAIL

In order to address the first challenge, the university developed a summer bridge program called SAIL—start, achieve, impact, lead. The target audiences included students from underrepresented populations, first generation students, and students whose high school academic records indicated they could benefit from early additional support. These student voyagers were paired with student navigators—returning students who received special mentor training. This program began with a three-day camp just prior to the beginning of the fall semester, followed by weekly activities throughout the academic year.

First Generation and DEI Councils

Likewise, a first generation council and national first gen membership were acquired. From these initial efforts, a first generation student committee was initiated along with numerous campus activities. Similarly, a diversity council made up of staff, students, and faculty was created along with action subcommittees, and a diversity, equity, and inclusion (DEI) purpose statement was codified. An African-American and a Hispanic-American student organization were formally added. In addition, a nontraditional student organization was created along with numerous support activities.

Financial Aid Support

The financial aid office began to hold FAFSA evenings in area school districts in order to help families, especially families new to the process, understand and navigate the myriad bureaucratic challenges of funding college tuition. Likewise, several day and evening events were held on campus to help existing students reapply for aid and scholarships for the next year. Documents and forms were translated into Spanish, and Spanish videos were created to help families navigate these processes and documents.

Tutoring Services

Tutoring services were greatly expanded to meet the increasing demands from the students. Research has shown that the largest growing population of students

using tutoring centers are B students who wish to become students earning A grades. In addition, most athletic teams were required to hold team study halls. Student tutors were now required to receive specialized training in order to better help their peers. Internal data indicated that students who received routine tutoring support increased their grade point averages by roughly a full letter grade.

Student Success Advisors

Integrated along with student tutoring services was the hiring of professional student success advisors. These two individuals help new students navigate the university's systems and procedures, get connected with appropriate support services, and in some cases, they serve as quasi-academic advisors. In addition, they provide a series of college success workshops ranging from study skills to time management, and from college-life involvement to accessing student technology.

Counseling Services

With ever-increasing student demands for additional counseling services, Piedmont doubled its professional counseling staff and partnered with an outside vendor to provide 24-hour tele-mental health services. Even with these efforts, the university will need to provide additional counseling support in the near future; however, finding credentialed professional staff is proving to be difficult for all institutions. Still, student satisfaction with the additional support has been quite encouraging.

Career Services and First-Year Experience

The career services staff has also doubled in size and has expanded its focus. It is now able to do more than provide students with career advice, resume and cover letter writing support, and matching students to potential employers. It now has moved to a full four-year developmental model for student career exploration. Even more, the career services office has taken the lead in tandem with the student success office to begin delivering an expansive view of the first-year experience program. This program is moving from a simple one-credit

first-year seminar to three one-credit courses including career development planning and leadership training.

Parent Advisory Council

As parent support and involvement is more crucial than ever before—and expected by parents, Piedmont University has initiated a parent advisory council to better connect with incoming and current families. Further, to embrace the student concerns for support program flexibility, all student support services are provided both in-person and through online formats. This has been critical during the pandemic crisis, and has been greatly appreciated by commuter students, and those taking online courses.

High Impact Practices

A final but critical component of Piedmont's retention successes has been its co-curricular programming. Following the work of George Kuh (2008) and AAC&U on high impact practices, the university planned and initiated a quality enhancement program (QEP) as required by all SACS/COC (Southern Association of Colleges and Schools/Commission on Colleges) institutions. The tripartite initiative focused on undergraduate research/scholarship with professors, global diversity through the study away programming, and leadership. Students at Piedmont who participate in one or more of these life transformational experiences retain at higher levels, anywhere between 88–100 percent. The retention increases for underrepresented populations has been even more striking.

While leadership is not formally recognized in the literature as a high impact practice, institutional data suggests that it is indeed a high impact practice. Leadership does not mean the student needs to be the captain of the baseball team, or the president of the student government association, but it might mean they are involved in a leadership group or an affinity group on campus. A freshman might search for opportunities to find connections with formal groups. Later they could join groups and eventually taken on increasing leadership opportunities in these groups. Students are also offered opportunities to receive leadership certification.

The first year of this training yielded a 100 percent retention rate for participants.

This endeavor's motto, chosen by the students, was QEP is HIP. Students made tie-dyed t-shirts and wrote on the shirts how they were hip (*e.g.*, study away, leadership, researcher). The retention rate for students who participated in the undergraduate research symposium was 94 percent. Students who participated in the co-curricular leadership certificate program retained at a rate of 100 percent the first year. Students who traveled for study away had a retention rate of 88 percent.

As noted above, the institution immediately increased the number of personnel devoted to student retention. Student successes, measured by increased retention and revenue, have allowed Piedmont to now hire an associate director of career services, an additional professional counselor, and an additional staff member for student transitions and retention. Most importantly, however, has been the hiring of two student success advisors who are assigned to freshmen students during summer orientation and remain with them their entire first year. These efforts have afforded Piedmont the opportunity to rethink and expand its first-year experience program, as already noted, and to hire additional staff for the other student support initiatives.

The Vortex: Getting Students to Register

Finally, the other primary focus of the Retention Vortex is to get students to register for classes for the upcoming semester. When registration begins for the next semester, the Vortex convenes. Every student on both campuses who should be registering is listed on the enterprise software spreadsheet and placed on a shared team site. The spreadsheet includes critical information such as academic advisor, class, residential status, campus, GPA, and financial or other holds.

Once registration begins, the Vortex tracks which students have not registered. All members of the committee have access to the team site and are encouraged to place comments on the spreadsheet indicating specific details they know about the students. For example, the student accounts member might note that they have an appointment scheduled with the student to set up

a payment plan. A faculty member might indicate the student has met with their academic advisor and will register later in the week. Or the faculty member might reach out to the student's faculty advisor to see if they can resolve any concerns.

For students who have no comments listed on the spreadsheet, a committee member is assigned to either talk directly with the student or to the student's faculty advisor. Very quickly comments are collected on each student, impediments are clarified and eliminated where possible, and students get registered. Because of the Vortex interventions, no student slips through the cracks, and each is connected with at least one professional early on.

The Vortex better connects support services to students who need additional help. For example, the newly adopted enterprise communication software allows any faculty or staff member to raise a flag of concern for a particular student. In fact, students use the software system to reach out for help, as well. The Vortex group can connect the appropriate service to the student in need. This process also completes the feedback loop for the parties involved.

What appears to be an overwhelming task quickly becomes quite manageable and very successful. Even more, it has brought disparate units across campus together on a weekly basis. These units are now better connected to one another, understand better what one another does, have been able to clarify and streamline policies and protocols, and collectively work together in support of student success. It also has made a tremendous impact on improving a culture of faculty and staff collaboration.

For example, all offices represented on the Vortex now understand the communications each shares with students. Common messaging and tone are created, and a smooth timeline of communications has been created. In terms of policy changes, student accounts now can place students on business I or II holds. The former is for students with a balance of less than \$1,000. These students can register without delay. Students with business II holds can register for classes once they have

communicated with the business office and have established a payment plan.

The New Admissions Vortex

The Retention Vortex has been so successful Piedmont has now created an Admissions Vortex. This team includes representatives from admissions, student life, residential life, student success, the business office, marketing, and athletics. They meet regularly to improve communication flow and expectations from each office with the families and to coordinate planning efforts. From this work, they have created an admissions road map, which describes to parents and new students all the tasks needed to move from admission to orientation and finally to matriculation. Each office involved plays a critical role and understands the roles and expectations of everyone else. Communications are no longer duplicated or even contradictory.

Conclusion

A Botany professor once said, "When you first transplant a shrub, the first year it sleeps. The second year it creeps. The third year it leaps." This metaphor is apt for enrollment management and student retention. Success takes careful and deliberative planning. At Piedmont University it took three years to leap to where it is today.

Indeed, student retention flows directly from student success efforts. At Piedmont, success has come from the Retention Vortex and flowed out across the campus. The work comes from myriad offices working directly with one another in a very deliberate and coordinated fashion. Once in place, these interlocking efforts have a natural flow, and adjustments can be made with little difficulty. In turn, a culture of student success flourishes.

Faculty and staff will unite together for a common cause, better understand the comprehensive nature of the institution, and enjoy their collegiality. Ultimately, these efforts retain more students, more students graduate, and more students get their money's worth for their college experience.

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