

The Effectiveness of the MOU Partnership

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## Table of Contents

I. Abstract .....	3
II. Introduction to the Problem .....	4
III. Description and Analysis of the Setting .....	6
IV. Into the Relational Frontier (Relationships, Access, & CRM) (Literature Review) .....	9
V. Methodology (SRM & Personal Interviews) .....	18
VI. The Effectiveness of the Memorandum of Understanding (Results Section) .....	21
VII. References .....	36
Appendix A: Table 1: SRM Filter Logic for UGA MOU School Joined Report .....	38
Appendix B: Figure 1: MOU Schools' Applications & Admits from 8/1 to 11/15 .....	38
Appendix C: Table 2: UGA MOU School Joined Report (SRM Report) .....	39
Appendix D: MOU Interview Questions & Rationale .....	40

### **Abstract**

One of the most exciting and exhilarating decision in the course of a person's life is college admissions. Amidst that decision comes many challenges and barriers that often lead to a desperate cry for help and the need for a guide amidst the chaos. Often high school counselors are that guide, but they are limited in time and resources causing students to struggle on their own academically and financially. Throughout my research, I have recognized three essential components in the college admissions process: the role of relationships in college admissions, regaining access to higher education, and relationship management (CRM). In this literature review, I will articulate how the role of relationships in college admissions is influential in regaining access to higher education and how relationship management strategically empowers the impact of relationships.

As a relationship management strategy, the Memorandum Understanding provides a partnership between Azusa Pacific University and sixteen local districts that creates an opportunity for students to regain access to higher education. The effectiveness of that partnership is proven through statistical data and variables that are explored through nine major themes: effectiveness, interactions, emails, outreach strategies, creative initiatives, access, territory management, improvements, and nonnegotiables. As a result, statistical analytics of the partnership are measured through quantitative research while the qualitative research provides experiences that provides context for opportunities improve structure, systems, and relationships. In conclusion, several interventions are proposed such as territory management best practices, strategies that creatively drive applications to admits, clear communication, MOU campus visits, and creating a promotional video for accessible understanding and marketing.

### **Introduction to the Problem**

At the start of a new school year comes the beginning of the college admissions process, which is both an exciting and exhilarating journey for high school seniors. Their journey consists of many challenges and barriers that often leads to a desperate cry for help and the need for a guide amidst the chaos. According to Donald Miller, every journey or story consists of the following structure: “A CHARACTER who wants something encounters a PROBLEM before they can get it. At the peak of their despair, a GUIDE steps into their lives, gives them a PLAN, and CALLS THEM TO ACTION. That action helps them avoid FAILURE and ends in SUCCESS” (Miller, 2017, Chapter 2, Section 4, para 1). Therefore, colleges and universities have the opportunity to be that guide for students who are facing various challenges with application deadlines, financial aid consultations, and more. For these students, the role of relationships in college admissions is influential in regaining access to higher education while relationship management strategically empowers the impact of those relationships.

At Azusa Pacific University, the Memorandum of Understanding (MOU) partnership is a strategic relationship management strategy that creates an opportunity for admissions counselors and high school counselors to partner together in a creative space to serve the students’ needs, understanding, and assess. In Genesis, God brings order to chaos by creating spaces and filled those spaces with living beings to be fruitful (New International Version). If that was God's intention to strategically create spaces and systems for fruitfulness, could creating spaces and systems amidst chaos also lead to greater opportunity for fruitfulness?

Overall, this research will explore the effectiveness of the Memorandum of Understanding as a relationship management strategy and the variables that effect and impact these local community partnerships. What are the servant leadership qualities and variable

interactions that make the Memorandum of Understanding partnership an effective relationship management strategy that increase application completion, admission into Azusa Pacific, and greater intentionality with students? Answering this question will provide further research on the role of relationships, regaining access to higher education, and establishing a relationship management strategy. In addition, this research will contribute to the literature on partnerships higher education like the Memorandum of Understanding as a relationship management strategy. Finally, this research will articulate the importance of research in the undergraduate admissions and how it can effect change, strategy, and decision-making.

### **Description and Analysis of the Setting**

Research will be conducted at Azusa Pacific University (APU), a faith based university committed to equipping and training difference makers who are making an impact in every sphere of society both locally and globally. In 1899, APU was founded as a training school for Christian workers with the motto “God First” and from those humble beginnings, APU is now the largest Christian university on the west coast as a member of the Council of Christian Colleges and Universities (CCCU). Primarily, the focus of this research will be on the enrollment management strategies of the Office of Undergraduate Admissions, which serves over 10,000 students every year and over 9,000 student applicants and their families each admission cycle throughout an academic year. In order to provide a high level of customer service, the office has adopted the CARE philosophy, an acronym that stands for **C**hoose joy, **A**ctively listen, **R**esolve the issue and **E**xceed expectations. In total, there are ten freshmen admissions counselors, one with the title of Assistant Director of Freshmen Recruitment and nine who are assigned at least one school district in partnership with APU through the Memorandum of Understanding. Each of these counselors have the autonomy to be dynamic experts of their territories that consist of local district territories, California State University regional territories, and out of area territories. Starting Fall 2017, Azusa Pacific University signed official partnerships with sixteen local school districts known as the Memorandum of Understanding.

The Memorandum of Understanding is a partnership with local school district that guarantees admission and provide a minimum financial aid package of \$10,000 for students who has attended an MOU school district for four-years, meets the minimum requirements for enrollment, and completes the A-G course requirements. Throughout the course of an academic

school year, these partnerships also provide opportunities for partnership through high school visits, college fairs, financial aid nights, and more.

Overall, this research will explore how providing an opportunity for students from MOU school to assess to higher education motivates them to complete their applications to the university. This research aims to investigate how the MOU partnership has increased the number of applications and admits into Azusa Pacific University in comparison to the historical data prior to the partnership between August 1<sup>st</sup> to November 15<sup>th</sup>, the early action decision deadline. While further investigating the variable effects of servant leadership that meet the needs of students, parents, counselors, districts, and local communities.

### **History and Background of the Problem**

Overall, the Memorandum of Understanding is a relationship management strategy that seeks to serve local school districts while providing access to higher education through a variety of different practical and relational capacities. According to data gathered by Ruffalo Noel Levitz (2016), the relationships that students have with their high school counselor, parents, and friends are the most influential relationships in the college decision making process. Committing to stewarding those relationships are essential to the role of an admissions counselor. Relationship management is how that takes place through leader-member exchange (LMX), which consists of either a transactional or servant leadership approach to these relationships. Oftentimes, it leads to transactional interactions at college fairs and high school visits through various means of communication that does not effectively serve students, families, and high school counselors.

Furthermore, amidst the 21<sup>st</sup> century problem of access to higher education, research conducted by Engberg and Allen (2011), suggests that students with higher levels of economic,

human, cultural, and social capital are more likely to enroll in college. Understanding these four domains provides context to the barriers that students experience while providing proactive resources and opportunities to educate and prepare students for these challenges by offering pathways for students to assess higher education.

Finally, colleges and universities that are driven by goals, rely on relationship management's three primary CRM practices: contact management, campaign management, and data-driven decision making (Campbell and Roberts, 2007), as a systematic approach rather than relationally outreach approach. As a result, the problem of transactional leadership, limited access to higher education, and systematic approaches to relationship management in the college admissions process must shift to a servant leadership approach committed to regaining access to higher education and relational outreach approach to relationship management.



### **Into the Relational Frontier (Relationships, Access, & CRM) (Literature Review)**

On August 28, 2017, the application to Azusa Pacific University was launched and all across the nation, high school seniors are entering into the most exciting and exhilarating process, college admissions. However, during their journey of applying to colleges, they are faced with many challenges and barriers, which can often turn into a desperate cry for help. Amidst the chaos, their college admission counselor has the opportunity to rise above the storm as a guide with the responsibility to advocate for their access to higher education. Throughout my research, I have recognized three essential components in the college admissions process: the role of relationships in college admissions, regaining access to higher education, and relationship management (CRM). In this literature review, I will articulate how the role of relationships in college admissions is influential in regaining access to higher education and how relationship management strategically empowers the impact of relationships.

### **Role of Relationships in College Admissions**

Throughout the college admissions process, high school counselors, parents, and friends can be the most influential relationships in students' college decision making process. According to research conducted by Ruffalo Noel Levitz (2017), "counselors have helped high school students find their way to college, sparking the college dreams of many generations. Yet, college and university enrollment leaders know little about this group of professionals and their role in college planning today" (p. 2). Therefore, it is essential for college admissions counselors to be committed to stewarding those relationships. When stewarding those relationships, their leadership provides the context, backing, and outreach necessary for impact.

**Influential Relationships.** In 2016, a survey was conducted by Ruffalo Noel Levitz on high school counselors and their role in college planning consisted of interviews with a

nationally represented sample. Through that survey, it became clear that counselors and parents are the most influential people in a students' search for the right college (Ruffalo Noel Levitz, 2016). Other than building schedules, high school counselors "spend a significant amount of time on college planning activities that range from the application process to finding a school to college financing" (Ruffalo Noel Levitz, 2016, p. 3). In addition, through an extensive study by Engberg and Allen (2011), students who enroll in college

were associated with significantly higher levels of human capital (i.e., academic preparation, savings for college, and importance placed on career/education), cultural capital (i.e., proximal and familiar aspirations for college attendance, parent involvement, and parent encouragement), and social capital in the form of parent networks (i.e., parent involvement in school activities) and peer networks (i.e., friendships groups with 4-year college plans). (p. 801)

As a result, parents and friends have a significant role in inspiring and motivating students while "helping parents better understand how their encouragement and aspirations can open the doors of opportunity for their children" (Engberg and Allen, 2011, p. 803). College admissions counselors, with their publications and support, function as coaches who provide the information and advice necessary in the college decision making process (Engberg and Allen, 2011).

**Leadership Impact of an Admissions Counselor.** Overall, relational influence leads to leadership impact. Northouse (2016), clearly defines leadership as "a process whereby an individual influences a group of individuals to achieve a common goal" (p. 6). As the leader-member exchange (LMX) takes place between admissions counselors and prospective students, the exchange transitions from strangers to acquaintances and eventually partnerships (Northouse, 2016). In the world of college admissions, when partnership starts to form trust is established and

interactions that are often transactional transforms into service. These leaders embody seven virtuous constructs: agapao love, humility, altruism, vision, trust, empowerment, and service (Patterson, 2003). These virtuous constructs support students as they make one of the most formational decisions of their lives. If their four years in college are some of the most foundational years of their lives, their decision making process becomes crucial to that foundation. When admissions counselors choose to be servant leaders, they become foundation builders who build foundational environments of trust opens the door for clarity in upward and downward communication (Patterson, 2003).

**Providing Context, Backing, & Outreach.** Since the 1960s, Community Based Organizations (CBOs) have been an example of servant leadership whose service provides “SAT prep, academic advising, free college trips, emotional support through the process, FAFSA completion, leadership opportunities, assistance with scholarships, and funds for emergency costs” (Shere, 2014, p. 29). In addition, these college counselors understand the context of a community of students and provide workshops and professional development that ultimately leads “to higher lifetime income and less likelihood of unemployment or incarceration” (Shere, 2014, p. 29). NACAC, National Association for College Admissions Counseling, also emphasizes the importance of empowering admissions counselors to build a greater connection to communities with backing to support and initiate opportunities to serve through these various outreach opportunities (Shere, 2014). According to Shere (2014), there are a lot of talented students overlooked due to their resources, but working with these students inspire them to “reach the highest level of success possible in college, returning to give back to their communities” (Shere, 2014, p. 30). Relationships are influential not only to the foundation of a student but ultimately the impact of an entire community.

### **Regaining Access to Higher Education**

Some of the most foundational years of a person's life are their four years in college, which will ultimately be solidified by the decisions they make that are informed by their values, principles, and ethical boundaries. These constant decisions start to formulate habits that begin to define the disciplines of who they are and the capacity of how they live their lives. Therefore, education predicts major disparities in chance, outcomes, and incomes, providing the "opportunity for every American to pursue an education that could potentially unlock a life of reward and fulfillment" (as cited in Engberg and Allen, 2011, p. 787). As a source of that fulfillment, academia and financial aid are recognized as most essential to the college decision making process, which prioritizes the importance of resourcing high school counselors with tools and resources to support their students (Ruffalo Noel Levitz, 2016). Over the years, the enrollment in higher education has increased, but not for students who come from low-income families due to sensitivity to costs lower preferences for education as well as academic ability (Declercq and Verboven, 2015). In order for a student to regain access to higher education, Daniel, Kanwar, and Uvalić-Trumbić (2009) articulates the importance of breaking higher education's iron triangle: access, cost, and quality.

**Access (Why Can't I Pursue a Four-Year Degree?).** Amongst counselors, students, and parents, access to higher education is the most important conversation in the admission process. As a result, eighty percent of seniors agree that financial aid is important while thirty-five percent of seniors report the difficulty of financing their college education (as cited in Ruffalo Noel Levitz, 2017). Research conducted by Engberg and Allen (2011) suggests that students who enroll in a two-year college or four-year university were associated with

significantly higher levels of capital in four areas: economic capital (i.e., household income, savings accounts, and economic resources),

human capital (i.e., academic preparation, savings for college, and importance placed on career/education), cultural capital (i.e., proximal and familiar aspirations for college attendance, parent involvement, and parent encouragement), and social capital in the form of parent networks (i.e., parent involvement in school activities) and peer networks (i.e., friendships groups with 4-year college plans). (p. 801)

These four different domains are essential for understanding the barriers that students experience during the college admissions process. Providing proactive resources and opportunities to educate and prepare students for these challenges offers access and aid for students regaining access to higher education.

**Cost (Why Costs Are High?).** Considering the economic capital of students, cost become another challenge and “research has shown that low income students are associated with lower expectations about educational attainment and take college entrance examinations less frequently compared to their high income counterparts” (as cited in Engberg and Allen, 2011, p. 787). Cost affordability for a four-year university has exceeded the affordability for most low and lower middle income families with the cost expected to escalate with a tuition cost that has increase twice as fast for the overall cost of living in the last twenty years (as cited in Washburn and Petroschius, 2004). These tuition increases are due to mixed factors such as state budget cuts, shrinking private endowments caused by an unstable economy, and increasing faculty salaries (Washburn and Petroschius, 2004). With these persisting trends in costs throughout higher education, understanding the quality and value of the investment into higher education becomes a monumental conversation that empowers students’ future.

**Quality (Pathways for Education).** Therefore, communicating the quality and value of higher education leads to activating pathways for education with college admissions counselors. With the ambition for quality education, student-centered learning communities are emphasized more than lecture-bazaar models “making aims for wide access, high quality, and low cost not achievable” due to the high expenditure per student (Daniel, Kanwar, and Uvalić-Trumbić, 2009, p. 35). In addition to the quality of education, students consider the importance of location, facilities, image, curriculum, and quality of the student body adding to the value of higher education (as cited in Washburn and Petroschius, 2004). Recognizing this social inequity requires a response for institutions to develop missional recruitment strategies that provide opportunities for students to regain access to higher education.

### **Relationship Management (CRM)**

With this missional opportunity, enrollment management can utilize relationship management strategies to empower admissions counselors “to deepen their market territories with new and emerging high schools that may typically be overlooked when developing annual recruitment targets” (Engberg and Allen, 2011, p. 803-804). Relationship management builds up the affinity people have for colleges and universities providing a connection that communicates commitment. According to Fayerman (2002), customer relationship management or CRM provides the “process and technology that can translate customer information into customer knowledge” (p. 58). Customer information and knowledge provide insight into the desires and motivations of constituents for meaningful communication (Campbell and Roberts, 2007). In the article “Schools Need to Rethink Their CRM Approaches,” Klie (2013) presents research from DemandEngine, a CRM consulting and interactive marketing service firm dedicated to colleges and universities, which articulates the CRM strategic goal deployment at U.S. schools were to

boost enrollment (67 percent), automate communication with prospects (65 percent), and measuring marketing results (46 percent). In order to reach these goals, there are three primary CRM practices needed to establish an effective CRM strategy: contact management, campaign management, and data-driven decision making (Campbell and Roberts, 2007).

**Contact Management (Touch Points & Record Information).** “Contact management is a philosophy that is designed to enable an organization to electronically track activities and interactions that an individual has with it” (Campbell and Roberts, 2007, p. 80). Overall, that philosophy informs disciplines and practices for consistent touch points and recording significant information provided through interaction with the constituent or member of the organization. According to Campbell and Roberts (2007), there are two priorities: entering notes and information as sharable summaries of knowledge that will benefit colleagues as well as updating the database with that specific information learned during interactions. These touch points are accompanied by the recorded information displaying detailed intentionality for constituents to be known and served well throughout the relationship.

**Campaign Management (Proactive & Reactive).** While campaign management is the process of designing and automating marketing strategies as a powerful tool that will enable organizations to build, schedule, and track marketing campaigns (Campbell and Roberts, 2007, p. 81). There are two types of these campaigns: reactive based on behavior and proactive based on goals. Proactive and reactive campaigns empower a greater sense of availability to constituents and approachability whenever there is a problem or need. Such availability and approachability lead to trust and loyalty as problems are solved and needs are being met.

**Data-Driven Decision Making (Capture, Enhance, & Analyze).** Holistically, relationship management’s data-driven decision making leads to wise discernment based on

good data that commits to capturing data, enhancing data, and analyzing data (Campbell and Roberts, 2007, p. 82). Whenever there is an interaction is captured data is enhanced providing statistic information to be analyzed for targeted campaigns based off of contact overall interaction. According to Fayerman (2002), relationship management provides a clearer picture of students and all the activities connected to those students, interactions between student and the institution, and specific information pertaining to the student regarding admissions, financial aid, and more. Institutions that commit to their CRM philosophy transform their organizational customer perception and outlook.

**Establishing an Effective CRM Strategy (Customer Service).** Throughout a consumer culture, personalized high quality customer service is an expectation that must exceed expectation through higher education admissions. Considering the iron triangle: access, cost, and quality, the financial investment into a students' future endeavors is a critical customer life cycle. Customer life cycle is a pattern that consists of four elements and stages: engage, transact, fulfill, and serve (ETFS) (as cited in Fayerman, 2002). In order to establish an effective CRM strategy, there are five recommended activities:

- Identify information and interaction process flows between the customer and your educational institution.
- Integrate customer service functions.
- Transition from reactive to proactive customer service knowledge.
- Shift to a customer-centered organization.
- Measure success and value over time (as cited in Fayerman, 2002, p. 60).

Throughout business spheres as well as higher education relationship management strategies are still being developed, refined, and transformed into a connective and changing atmosphere of



customer services. As a result, there is a lot of autonomy to develop new relationship management strategies that lead to greater trust, investment, and service.

There is a critical role that admissions counselors are responsible for throughout the admissions cycle. Such responsibilities range from being relational servant leaders to regaining access to higher education while strategically managing numerous constituents throughout the course of a year. College admissions is an influential journey of regaining access to higher education through pioneering relationship management strategies that will be empowered by creativity. Becoming aware of the role of relationship, access to higher education, and relationship management strategies provide a foundation for a creative launching pad that will launch admissions counselors into the relational frontier full of dynamic endeavors, new territories, and fruitful relationships.

### **Methodology**

In my literature review, I defined the problem of admissions counselors' accessibility to high schools as well as students access to higher education while unveiling the influence and motivation of a student. With that understanding, I will explore relationship management as a relational outreach and how relationship management in the form of the Memorandum of Understanding leads to more applications and admits. As a result, based off of Walliman's (2011) approach to research, the mixed methods approach will consist of the research of new knowledge that will utilize quantitative research to describe and explain results while the qualitative research will evaluate, compare, and correlate the variables of those results (p. 8). Therefore, research will be conducted with a sequential mixed method approach to both quantitative and qualitative research approaches.

Through quantitative research, I will utilize data from Salesforce Relationship Management (SRM) to research the number of students from all of the MOU partnered schools who have applied and were admitted to Azusa Pacific University between August 1<sup>st</sup> to November 15<sup>th</sup> for Fall 2017 in comparison to Fall 2018. For my sample for my quantitative research, I will focus on the existing Memorandum of Understanding partnerships between thirteen school districts: Arcadia, Azusa, Bonita, Chaffy Joint Union High School, Charter Oak, Chino Valley, Claremont, Covina-Valley, Duarte, Glendora, Monrovia, Temple City, West Covina, and Upland. This quantitative probability sampling provides a reliable representation of each population. Through SRM (Salesforce Relationship Management), I will run reports to collect historical data that will inform the overall comparison of applications and acceptance with MOU partnership prior to November 15th. For my quantitative analysis, I will utilize

bivariate analysis, which will articulate the before and after MOU partnership data with a bar graph that will display its differences.

Lastly, I will gather qualitative research through interviews that will reveal variables that exist in the relational partnership between the high school counselor and the admissions counselor. These interviews will draw out various variables and strategies that may or may not have contributed to the effectiveness of the MOU partnership. With each partnership comes the stewardship and servant leadership of an admissions counselor who plays a critical role in relationships with students, parents, and counselors. For my qualitative research, I will select a sample of eight freshmen admissions counselors to interview in person focusing primarily on their experience and interactions with their assigned MOU school districts. Through these interviews, the qualitative sampling will form generalizations could potentially provide both specific and very limited results.

Collecting the data will consist of intentional interview questions (see appendix D) asked during the individual interviews that are scheduled through Calendly, a website that schedules meetings. During those interviews, I hope to discover various variable interactions, measure the effectiveness of meeting minimum requirements, record barriers within the relationships, indicate challenges throughout the overall partnership and approach, and gather suggestions for improvement. These areas will be explored through nine major themes: effectiveness, interactions, emails, outreach strategies, creative initiatives, access, territory management, improvements, and nonnegotiables. With the quantitative data, I will be able to measure statistical results of the partnership and with the qualitative data, I will be able to record experiences that could potentially provide opportunities for a change in structure, systems, and relationships. For my qualitative analysis, I will utilize Bromley's ten steps as well as data

reduction to review emergent variables in a summary of the interviews, data display through role ordered displays articulating how a person's role or view of through role effects their behaviors and expectations, and data analysis through narrative analysis.

### **The Effectiveness of the Memorandum of Understanding (Results Section)**

Understanding the effectiveness of the Memorandum of Understanding through quantitative data analysis will provide Azusa Pacific University admissions counselors with analytics that can help drive decision-making throughout the admissions cycle. Qualitative research results will display the experiences, creativity, and qualities of a diverse admissions team through their own unique servant leadership approach. As a result, the team's commitment to regaining access to higher education and relational outreach approach to relationship management becomes the launching pad admissions at Azusa Pacific University.

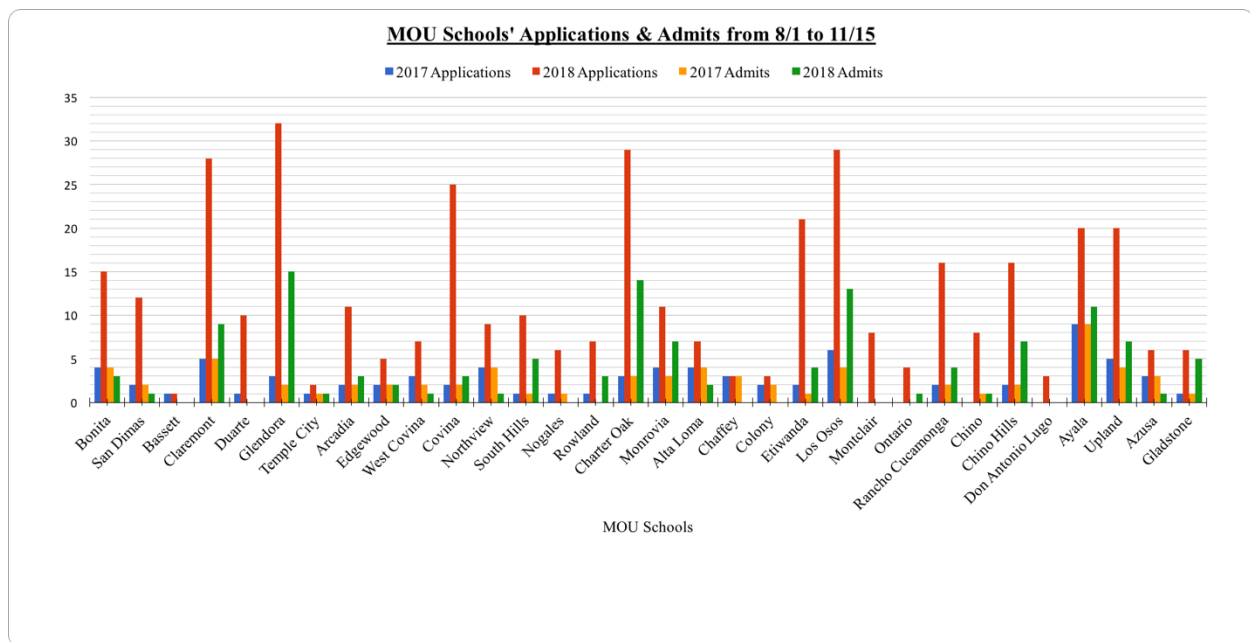
**The Effectiveness of the MOU Partnership According to Quantitative Data.** Through the Salesforce Relationship Management (SRM) a quantitative report was created to gather the statistical data of ten different MOU groupings (CompGrps) consisting of districts and counselor territory management assignments. Table 1: SRM Filter Logic for UGA MOU School Joined Report includes all schools with territory grouping equals MOU, application center equals undergraduate, date field with the last activity equals custom (8/1/2017-11/15/2017), and start term and year equals Fall 2018, Fall 2017, and Fall 2016. While the admit report consists of the same filter logic with an additional filter including application decision equals admit.

**Table 1: SRM Filter Logic for UGA MOU School Joined Report**

<b>Applications</b>	Show: All schools
	Date Field: Last Activity equals Custom (8/1/2017 to 11/15/2017)
	Start Term and Year equals Fall 2018,Fall 2017,Fall 2016
	Application Center equals Undergraduate
	School Name: Territory Group equals MOU
<b>Admits</b>	Show: All schools
	Date Field: Last Activity equals Custom (8/1/2017 to 11/15/2017)
	Application Decision equals Admit
	Application Center equals Undergraduate
	School Name: Territory Group equals MOU
	Start Term and Year equals Fall 2018,Fall 2017,Fall 2016

As a result, Table 2: SRM Report- UGA MOU School Joined Report (see the appendix) and Figure 1: MOU Schools’ Applications & Admits from 8/1 to 11/15, display the results of the ten different groupings with their MOU school assignments along with the number of 2017 applications, 2018 applications, 2017 admits, and 2018 admits from August 1<sup>st</sup> to November 15<sup>th</sup>, the early action decision deadline.

**Figure 1: MOU Schools’ Applications & Admits from 8/1 to 11/15**



**Early Action Decision Excitement.** Traditionally the early action decision deadline captures students who are excited about applying to Azusa Pacific University due to the recommendation of previous alumni, campus visits, recommendations, advertisements, and other marketing initiatives. Often those who apply after the November 15<sup>th</sup> deadline choose to apply after applying to major state college systems such as the California State University (CSU) and University of California. According to students’ personal statements, those who apply to Azusa Pacific University prior to November 15<sup>th</sup> find Azusa Pacific University as holistically desirable, academically reachable, and financially accessible. According to the data presented in Figure 1:

MOU Schools' Applications & Admits from 8/1 to 11/15, the number of applications in 2018 has drastically increased at a majority of the MOU schools: Covina High School increased from 2 to 25, Charter Oak from 3 to 29, Etiwanda from 2 to 21, Glendora High School increased from 3 to 32. According to the data set, the total number of application received in 2016 was 79 while in 2017 it increased almost five times the previous amount to 390 applications by November 15<sup>th</sup>. Overall, it can be inferred that the added excitement of the MOU partnership leveraged by the intentionality of fairs, visits, and meeting with admissions counselors sparked recorded breaking application submissions.

***Intangible Outliers: Signings, Visits, and Demographics.*** Overall, there is a total of 32 MOU schools and 10 admissions counselors with territories with various intangibles. In comparing the 2017 and 2018 data, there were some schools that had small increases or the same number of applications due to later signings, quality of visits, and college readiness. During the August 1<sup>st</sup> to November 15<sup>th</sup> date range, Bassett, Rowland, Temple City, and West Covina school districts signed MOU partnerships affecting the communication from the district level to the high school counselors. In addition, when the MOU was signed with Temple City, they were originally assigned to CompGrp5 while West Covina was assigned to CompGrp4, but was switched immediately after the first visits to each of the district. Both counselors of CompGrp4 and CompGrp5 expressed that the confusion did not affect their visits or communication with the counselors, but both agreed that it had affected students' ability to connect with who their counselor was after the change. Furthermore, for the CompGrp8 counselor, the quality of the Chaffey High School visit consisted of a two-period lunch fair with other colleges resulting in three Information Request Cards (IRCs) that did lead to applications and admits and minimum communication with the college counselor. Being able to have a regular high school visit with

intentional communication with the counselors about the MOU partnership could have potentially built the intentionality and excitement necessary for more applications. Finally, district demographics consisting of college readiness and socioeconomic status is another factor especially for CompGrp11, Azusa and Gladstone, who over the years have had the closest proximity and relationship to Azusa Pacific University. However, according to the California Department of Education (2017), based off of a 2013-2014 student cohort, Azusa Unified consisted of 632 students with 154 prepared for college and 107 approaching prepared with 83% of students out of 632 students who are socioeconomically disadvantaged. With these statistics, it is possible that even with the MOU partnership there are barriers that students, families, and counselors still face when it comes to applying to private higher education.

*Applications to Admits.* Lastly, the total number of admits increased from 70 in 2016 to 124 in 2017, which was 1.77 times the amount of admits than 2016. Although it was not an exponential improvement compared to the number of applications, the data provides insight to analyze the conversion from applications to admits. Therefore, when analyzing the data set, it can be inferred that all of the CompGrps need to increase the emphasis on completing applications and removing any barriers that could prevent students from completing their application. Based on the data, further studies can be conducted on the effects of CompGrps demographics on applications to admission, challenges out of area recruiting has on reviewing applications, barriers students have when completing their application, processing timeline of submitted applications to complete- pending review and quality of applications since the MOU partnership. Through this quantitative data analysis, the next generation of Azusa Pacific University undergraduate admissions counselors with analytics and conclusion that can help drive decision-making throughout the admissions cycle.



**Effective Relationship Management of the MOU According to Qualitative Data.** In addition, the effectiveness of the Memorandum of Understanding can also be studied through qualitative research conducted by personalized interviews with various CombGrp admissions counselors. These interviews will display the effectiveness of the MOU partnerships as a relationship management strategy through experiences, creativity, and qualities necessary for a diverse admissions team with their own unique servant leadership approach. Interviews were conducted by asking nine open-ended questions focused on the nine themes: current impact, interactions, email exchanges, outreach strategies, creative initiatives, regaining access to higher education, effects of out of area territory management, improvements, and non-negotiables needs for admissions counselors to thrive.

***Current Impact of the MOU Partnership: Excitement and Awareness.*** From the moment, the MOU partnerships were signed, there has been an impact through the immediate excitement and engaging awareness across districts. Such contagious excitement has engaged communities, building greater trust as a valued connection with buy-in, which has become an “x-factor” that has added value to the Azusa Pacific University on the map across universities. Often the faces of students light up to the impossibility of higher education that becomes a possibility with the MOU partnership as an open invitation that serves as a Kickstarter for students to begin thinking about their future. Higher education becomes reachable and realistic for students considering their previous hesitations about private institutes’ accessibility and affordability, but after the partnership at a local college fair, there was a lot of excitement from parents, newspapers, and people were sharing the craze on social media (CombGrp3, personal communication, November 20, 2017). According to the CombGrp7, the role of the admissions counselor transformed into a resource that provides

students an avenue and information to potentially pursue a degree in higher education. [The MOU] gives students within our area and own backyard, motivation and tangible information that if [students] meet these benchmarks [they] have guaranteed admission to a school right down the street. If they are interested in APU that is fantastic, but if not at least it gives them an academic record that makes them competitive elsewhere (personal communication, November 20, 2017).

Overall, it is clear that building awareness leads to applications, but across nine of the ten CombGrps, most high school counselors were unaware of the partnership considering it being the first year and challenges with communication from the district level to the various counselors. Most CombGrps admissions counselors mentioned that the impact of the partnership would have been even greater if there was more awareness districtwide rather than high school counselors first hearing about it from an admissions counselor. Therefore, amidst all the excitement and awareness, the current impact scratches the surface of the potential of the MOU partnerships throughout all districts.

***Interactions with MOU Counselors: Trust, Communication and Understanding.***

Oftentimes relationships between admissions representative and college counselor can be often transactional but Azusa Pacific University intentionally function from a servant leadership approach. Through the C.A.R.E. model, these admissions counselors choose joy, actively listen, resolve the issue, and exceed expectations. Based off the research the interactions with MOU counselors have established trust, developed an importance of clear communication, and created deeper understanding of high school counselors in each district. Being a trusted resource is leveraged by CombGrp1 admissions counselor stating, “[They] are an MOU school and I am trusted source of information for them. Let me [bring] those together to help leverage each one...

to show [high school counselors] that I want [them] to come to me first for any needs that [they] have" (personal communication, November 16, 2017). Overall, the partnership draws out the potential out of students and the relationships with the college counselors. Rather than checking off transactional boxes, it is important to remember that it is all about relationships (CombGrp4, personal communication, November 17, 2017). Trust is established through relational frequency and each of the CombGrp admissions counselors seek deeper and personal relationships with their MOU, but balancing professional and personal dynamics is understood by the degree of clear communication. These dynamics are articulated as friendship and partnership by CombGrp2 admissions counselor stating that friendship connects on a deeper level in and out of the work place while partnership focuses on the work context and business. As a result of the partnership, there is the potential for higher graduation rates and college awareness for the high school as well as encouraging students to see Azusa Pacific as an option for their students. Finally, interactions led to a greater understanding of the college counselors, which led to the general realization that these college counselors have large caseloads as well as a primary focus on pushing the CSU and UC applications.

*Email Exchanges with MOU Counselors: Transactional and Clarifying.* One of the primary means of communication is emails and these email exchanges have been mostly transactional and clarifying. All CombGrps expressed the transactional nature through providing information, emailing transcripts, business tones, scheduling, and clarifying information. According to CombGrp8 admissions counselor, email exchanges have been for scheduling and with a straightforward, [factual, professional], and transactional [undertone]. Not much conversing because these counselors are busy, but having conversational speech in emails have helped" (personal communication, November 16, 2017). In addition, there has been a need for

clarification across all CombGrps and it was suggested from CombGrp7 that counselors, parents, and students could benefit from an MOU frequently asked questions (FAQ) resource.

***Outreach Strategies: Personal, Local and Organizational.*** With the creativity of each admissions counselor and understanding of each MOU district, there are many ideas for outreach strategies that can be sorted into three categories based on the scale of production: personal, local, and organizational. Putting a face to Azusa Pacific University comes from the frequency of personal touches by visiting high schools, utilizing ZipScript for personal notes and holiday cards, coffee connects that connect with students on a comfortable one on one context, and having MOU personalized flyers and banners for college fairs. In addition, having events that break down barriers that keep students from going to college through local outreach in the form of application and scholarship workshops, application and admit pizza parties, financial aid nights, and lunch with counselors. Also, getting to know the staff before and more than the students can create a trickle-down effect of influence in students understanding and decision making. On an even larger organizational scale, inviting MOU schools to sporting events as well as creating an opportunity for MOU students to be able to come on the campus for personalized tours, class visits, student panels, and appointments with counselors. More intentionally having an MOU counselor day at Azusa Pacific University provides a greater context and understanding of the partnership and University.

***Creative Initiatives from the MOU District: Dialogue.*** Partnerships are two-ways and for the most partnered CombGrp MOU counselors have not reached out and schools are still simply trying to understand the partnership. Traditionally with the excitement of the partnership, there were creative initiatives from MOU schools such as a counselor meeting with Chaffey Unified with the request to have on-site admission events, college night at Bonita, financial aid night at

Glendora, a panel discussion at the West Covina college fair. In addition, the majority of districts are interested in busing students to Azusa Pacific University for an MOU visit day. With other universities establishing partnerships with these local school district, it is important to explore what sets Azusa Pacific apart from the other MOU partnerships through these outreach strategies and creative initiatives. Considering it is the first year of the partnership, the dialogue has been initiated between high school counselors and admissions counselors for creative initiatives.

***Regaining Access: Motivation and Deferment.*** Regaining access to higher education becomes tangible through the MOU partnership with a guaranteed promise as a motivational tool that causes students to light with new hope. Such hope is come from communicating minimum requirement in a way that is “reassuring with arms open providing tools throughout the process as a myth buster that students can be admitted into colleges and receive financial aid. Two factors that keep students away from even applying to particular universities” (personal communication, November 16, 2017). While applying to large public systems can be daunting contributing to a sense of anxiety with feelings of unworthiness, the MOU partnership creates a sense of belief and consideration that helps believe that they can get into a four-year university. Higher education becomes a possibility even for students who are deferred not meeting the minimums at first but have the potential to be admitted. From that point, counselors have the opportunity to come alongside students early on in the process to create a pathway for admission or transfer from a community college in the future. Deferment can be discouraging but providing a framework to communicate deferment and strategy for admissions counselor become a guide for these students while partnering with their college counselors provide a new hope. As an alumnus from an MOU school, the admissions counselor for CombGrp11 who was one of few who attended a four-year university, stated, “If I had received the MOU, I would be 40,000 in

less debt if the MOU had existed for me" (personal communication, November 22, 2017). With the consistency of the MOU partnership, students' have the opportunity to regain access to higher education and create a college-going culture at their high school.

***Effects of Territory Management: Proximity and Priorities.*** With the added excitement to work with the MOU school districts, admissions counselors also needed to balance out of area recruiting with a school who may not be as aware or familiar with Azusa Pacific. While the general consensus articulated the difficulty of logically balancing the priority of the MOU partnership and proximity of the out of area territories "when geographically in another location" (personal communication, November 17, 2017). There is an element with scheduling with stewardship with proactively planning as well as leveraging the timing of various national college fairs. Overall, there was an articulated need for clarity and strategy for prioritizing MOU and out of area responsibilities and territory management goals. Such as when the MOU has a fair that is a priority and having to reschedule four CSU visits for that visit. Priorities switch and change and we have to be flexible, but could the time and resources spent to visit non-responsive CSU schools be utilized to MOU more into MOU schools? There have been several times when admissions counselors would drive out of area for visits and students do not show up or counselors may have forgotten about the visit. Due to large public university deadlines, most schools have a high priority focus on helping students navigate through that rigor application process rather than taking the time to encourage students to complete their private school applications. Therefore, there are many effects and variables that exist throughout out of area territory management that have the potential impact MOU partnerships as well as overall recruitment holistic strategies.

***Improvements: Clarity and Communication.*** Considering that the Memorandum of Understanding was launch this year the understanding the holistic effective will not be fully understood until a full admissions cycle is complete. However, being able to understand these various themes and factors that exist throughout the partnership will help inform decision making for further refinement and improvement for years to come. Clarity and communication of the partnership have been the primary need for improvement. All of the CompGrps admissions counselors have expressed the need for centralized and unified communication as well as expectations and clarification on outreach strategies, events, affinity and scheduling practices. In addition, developing various word sets can help counselors communicate foundational MOU components effectively. Specifically, the most confusion exists with the hardest conversation that has to do with "10,000 guaranteed financial aid. A lot of students think that this is on top of whatever scholarships and [financial aid] they are receiving" (personal communication, November 17, 2017). If a student is receiving a \$19,000 scholarship the \$10,000 guaranteed financial aid is included within that amount, which can seem tricky to some students but it guarantees aid for students who are not currently receiving anything based off of merit. As an ambassador of Azusa Pacific University, becoming an expert of the university and admissions professional starts with empowerment that provides both clarity and communication.

***Non-negotiables of an Admissions Counselor.*** Finally, six non-negotiables of an admissions counselors are articulated based on the consolidation of each CompGrp admissions counselors' non-negotiables that are clearly exemplified in the research of the last six themes. Those non-negotiables are servant leadership, generational leader, contextualization, effective communication, time management, and self-care. Servant leaders embody seven virtuous constructs: agapao love (agents of hope filled with empathy, passion, and deep care), humility

(resilience, grit, and grace), altruism (relational intentionally with a deep care to serve others), vision (full of strategic vision with an intrinsic motivation), trust (authenticity and accountability), empowerment (creative and autonomous with a coachable spirit and synergy in team dynamics to execute the vision), and service (customer service with a friendly and gregarious hospitality) (Patterson, 2003). These servant leaders are led by generational leaders who carry an executive presence with maturity as a seasoned admissions professionals as supportive trainers, dynamic visionaries and reproduce generations of admissions professionals. Along with the diversity in an age of globalization, understanding culture and context makes contextualization essential for being a strategic territory manager and admissions professional. Understanding cultures, demographics, major trends, graduation rates, socioeconomics, and A-G requirements are just some of many factors of contextualization in the admissions profession. Effective admissions counselors are also effective communicators who communicate clearly, frequently, publicly, intentional, and internally. With many goals, tasks, and priorities, time management is empowered through adaptability, flexibility, and availability as a detail-oriented agent of change. Finally, life outside of the admission role is essential or it will become your life and will not be life-giving, which makes self-care consisting of laughter, community, and quality of life a non-negotiable. These non-negotiables make the Memorandum of Understanding partnership an effective relationship management strategy that increases application completion, admission into Azusa Pacific, and greater intentionality with students, parents, and counselors. These nine themes provide research on the role of relationships, regaining access to higher education, and establishing a relationship management strategy in the context of the Memorandum of Understanding for future recommendations and interventions.



### **Recommendations and Interventions**

Overall, research demonstrates the effectiveness of the MOU partnership and relationship management strategies. With the excitement of new territory management initiatives, while pioneering the MOU partnerships, admission counselors face the challenge of the proximity and priorities of out of area territory management as well as clarity and communication about the MOU partnership. At the completion of the admissions cycle, admissions counselors will have a deeper knowledge of their territories that will inform the districts and school that have higher priorities for investment. Having a greater focus on specific yield gaps as well as high yield schools will help identify the schools that have the potential to not just drive more application, admits, and deposits but also relationship and partnerships for the future.

With the quantitative research articulating a small increase in application to admittance, strategically leveraging the proximity of MOU schools and enlisting relationship management strategies that creatively drive applications to admits at MOU schools would increase enrollment. While developing best practices with qualities, expectations and strategies for admissions counselors' MOU relationship and territory management will be the catalyst to that increase. By utilizing the qualitative research as a conversation starter for best practices will lead to greater clarity and communication that will help admissions counselors prioritize their visits and narrow their strategic vision for their MOU schools. However, without greater awareness and clear communication about the MOU partnership with counselors, parents, and students' confusion and lack of insight could limit the potential of this year's effectiveness. By developing frequently asked questions (FAQ) sheet with engaging flyers along with signage for MOU college career centers, college counselors will have the details and tools necessary for greater advocacy and awareness. Additionally by leveraging the excitement of all of the articles and signings regarding

the MOU partnerships having a big on campus MOU event with a press conference that will publicize the partnership across all of these communities. On the day of the event, being able to bus seniors and juniors will provide an opportunity for students to be exposed to a college campus. Having various workshops, tours, and class visits will help students regain access to higher education through the motivation that is built throughout the event. Finally, being able to capture the opportunity that the partnership has to offer by creating a video of the MOU event with stories from MOU alumni, detail about the partnership, and the mission of Azusa Pacific will build excitement for years to come. These interventions have the potential to take the Memorandum of Understanding partnership, territory management, and relationship management to the next level.

Although further research is recommended such as understanding the demographic factors of each MOU school, researching how focused recruiting eliminates yield gaps and increasing high yield areas for out of area recruiting, defining the six non-negotiables of an admissions counselor, and testing admissions MOU relationship management best practices. Understanding the demographic factors of each of the MOU schools will provide further research that can provide context to the various needs that admissions counselors can serve. By researching how to eliminate yield gaps and increase high yield territories can help develop strategies for more effective out of area territory management. While deeply studying and researching the six non-negotiables of an admissions counselor will help them have a better understanding of these values so that they can be effectively practiced. Finally, after creating best practices for MOU relationship management researching its effectiveness by testing out the different practice will help solidify what practices lead to specific results. These

recommendations provide an additional opportunity for admissions professional to grow themselves as servant leaders who make a generational impact in their admissions offices.

In conclusion, the Memorandum of Understanding is an effective relationship management strategy that increases the number of completed applications and admission into Azusa Pacific University through the servant leadership of admissions counselors. As a primary guide in the admissions process, it is clear that the role of relationships is essential to regaining access to higher education by establishing a relationship management strategies. By partnering with local communities, Azusa Pacific University continues their legacy of transforming communities by equipping and training difference makers who are committed to making an impact in every sphere of society both locally and globally.

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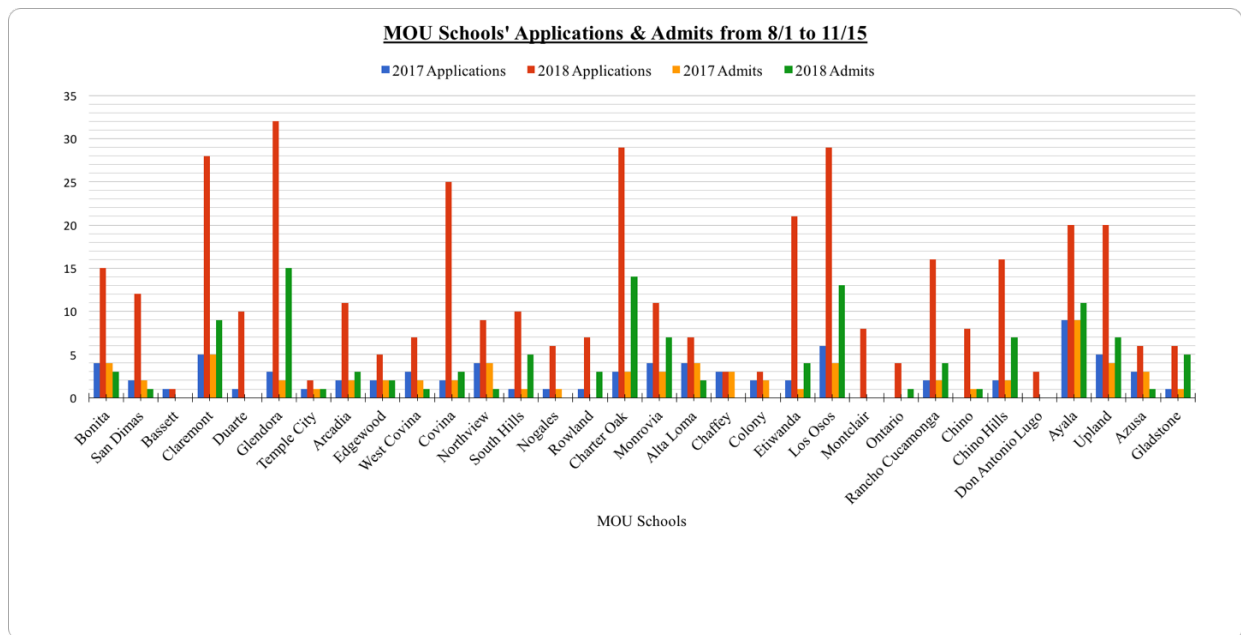
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**APPENDIX A: Table 1: SRM Filter Logic for UGA MOU School Joined Report**

<b>Applications</b>	Show: All schools
	Date Field: Last Activity equals Custom (8/1/2017 to 11/15/2017)
	Start Term and Year equals Fall 2018,Fall 2017,Fall 2016
	Application Center equals Undergraduate
	School Name: Territory Group equals MOU
<b>Admits</b>	Show: All schools
	Date Field: Last Activity equals Custom (8/1/2017 to 11/15/2017)
	Application Decision equals Admit
	Application Center equals Undergraduate
	School Name: Territory Group equals MOU
	Start Term and Year equals Fall 2018,Fall 2017,Fall 2016

**APPENDIX B: Figure 1: MOU Schools' Applications & Admits from 8/1 to 11/15**



**APPENDIX C: Table 2: UGA MOU School Joined Report (SRM Report)**

<b>Grouping</b>	<b>MOU Schools</b>	<b>2017 Applications</b>	<b>2018 Applications</b>	<b>2017 Admits</b>	<b>2018 Admits</b>	
CombGrp1	Bonita	4	15	4	3	
	San Dimas	2	12	2	1	
CombGrp2	Bassett	1	1	0	0	
	Claremont	5	28	5	9	
CombGrp3	Duarte	1	10	0	0	
CombGrp4	Glendora	3	32	2	15	
	Temple City	1	2	1	1	
CombGrp5	Arcadia	2	11	2	3	
	Edgewood	2	5	2	2	
	West Covina	3	7	2	1	
CombGrp6	Covina	2	25	2	3	
	Northview	4	9	4	1	
	South Hills	1	10	1	5	
	Nogales	1	6	1	0	
	Rowland	1	7	0	3	
	Charter Oak	3	29	3	14	
CombGrp7	Monrovia	4	11	3	7	
	Alta Loma	4	7	4	2	
CombGrp8	Chaffey	3	3	3	0	
	Colony	2	3	2	0	
	Etiwanda	2	21	1	4	
	Los Osos	6	29	4	13	
	Montclair	0	8	0	0	
	Ontario	0	4	0	1	
	Rancho Cucamonga	2	16	2	4	
	CombGrp9	Chino	0	8	1	1
		Chino Hills	2	16	2	7
Don Antonio Lugo		0	3	0	0	
Ayala		9	20	9	11	
Upland		5	20	4	7	
CombGrp11		Azusa	3	6	3	1
	Gladstone	1	6	1	5	
<b>TOTALS</b>		79	390	70	124	

**APPENDIX D: MOU Interview Questions & Rationale**

- Describe the **current impact** of the MOU partnerships with your MOU district(s).
  - Rationale: Understand current impact of the MOU partnership.
- Describe your **interactions** with your MOU college counselors and describe the ideal interactions you wish to have with your MOU college counselors.
  - Rationale: Understand if the interactions have a transactional or servant leadership approach. Search for servant leadership qualities.
- Describe your **email exchanges** that have taken place between you and the College Counselors in your partnered MOU district(s).
  - Rationale: Understand the tone and initiative of the email exchanges if it is more transactional or service oriented.
- Describe any **outreach strategies** enlisted or ideas that you as the admissions counselor have explored in your partnership with your assigned MOU district.
  - Rationale: Record any variables initiated by the admissions counselor that may have led or could lead to greater yield percentage.
- Describe any **creative initiatives** that the MOU district has made with the university to improve or benefit the existing partnership.
  - Rationale: Record any variables initiated by the MOU college counselor that may have led or could lead to greater yield percentage.
- Describe how the MOU partnership provides an opportunity for student to **regain access to higher education**.
  - Rationale: Understand the impact the MOU partnership has on access to higher education.



- Describe whether or not your **out of area or CSU territory management** has affected your opportunities and interactions with your MOU schools.
  - Rationale: Record any variables that may have caused an effect on the interactions with the MOU partnership.
- Describe how the MOU partnership can **improve**.
  - Rationale: Create of list of any improvements that could improve the MOU partnership.
- Describe any **nonnegotiable characteristics or traits** needed for admissions counselors to thrive in their role.
  - Rationale: Develop a list of core competencies needed for thriving admissions counselors and utilize that for further research and training purposes.