

Sonoma State University Strategic Enrollment Management (SEM) Plan

Fall 2025 Update as of 9/5/25 - Next Update in early Spring 2026 after the release of the CSU Systemwide SEM Plan

The enrollment and recruitment higher education landscape in California continues to be more competitive each year. During the next decade, the number of high school graduates in the state will continue to decrease. At the same time, CSU campuses are experiencing increased competition from each other, the UC, and our community colleges. In addition, more private and out-of-state institutions are actively recruiting in California.

In 2024-25, Sonoma State halted the extreme enrollment drops that the University had experienced over the past several years by implementing multiple strategic enrollment initiatives. The 2025-26 budget crisis and associated cuts, however, drastically impacted the University's ability to continue to grow enrollment. The adjustments were so severe that the university again experienced a substantial enrollment reduction for fall 2025. It is within this context that an updated Strategic Enrollment Management has been developed. The new plan continues the University's transition from an outreach approach to a more strategic model of active recruitment. These changes are necessary to enable the University to recover from drastic budget cuts, regrow enrollment, and become more competitive in the future. To complete this transition, the University is currently implementing a series of new strategies as outlined below.

1. Rebranding and University Marketing

Sonoma State must overcome three substantial obstacles to more effectively compete for students in the current and future market. First, SSU's current branding is outdated and non-engaging. Second, the University's marketing capabilities were extremely limited for the past several years. Only recently (Spring 2025) did the University reinvest in University Marketing. Third, the University's website was not easy to navigate, featured outdated information and abandoned pages, and was poorly structured to support recruitment and retention.

To address these challenges, President Cutrer submitted a proposal to the CSU Chancellor's Office in Fall 2024 for a one-time grant to support the university's rebranding and marketing challenges. The grant was approved for \$2.5M. She also moved Strategic Communications and Marketing to report to the Vice President for University Advancement. With the CSU grant and new Marketing structure, Sonoma State is embarking on a two-year initiative to address the three challenges outlined above. The Rebranding and Marketing Proposal is available by contacting the division of Strategic Enrollment or University Advancement.

2. Diversified Lead Generation

Sonoma State, like many universities, has traditionally generated prospective student leads through strategies like buying names from the College Board and generating inquiries from outreach activities like college fairs and high school nights. However, as evidenced by the drop in enrollment for the past several years at Sonoma State, these kinds of strategies are inadequate when the prospective student market changes (as happened after the NorCal fires, the recent pandemic, and the university's large-scale budget cuts). The geographic sensitivity of prospective student markets and brand reputation are critical factors to consider for institutions that are not surrounded by a large population base, that have a substantial on-campus housing inventory (like Sonoma State), and that have gone through a considerable reduction in programs resulting in a substantial negative public backlash.

To address these challenges, Sonoma State has been moving from a more traditional outreach model to an active recruitment model. To support active recruitment, SEM staff need to generate more productive leads. One strategy will be to partner with vendors who work to match students with universities. This transition is detailed below:

For the 2024-25 year, high school names were obtained directly through the vendors based on academic and geographic criteria. These prospective students are added to the communication flows in Slate (the University's CRM). Since the prospective students had no prior connection to the university, these names are considered **cold leads**. The university obtained 85,000 cold leads for the fall 2024 and 2025 recruitment cycles. Grants from the Chancellor's Office paid these

costs. Cold leads have typically yielded at about 1.5% or less for Sonoma State. This yield rate is inadequate to support enrollment growth strategies, further underscoring the need for brand recognition and marketing efforts.

For 2025-26 through 2027-28, Sonoma State is pursuing a more focused lead generation strategy using several different vendors. Prospective student leads for high school and community college students with an expressed connection (and/or interest) to the university are considered **warm leads**. Warm leads with an expressed interest in the university typically yield between 5% and 7%. Through these strategies, SSU is investing approximately \$300K/year in diversified lead generation (financially supported through the \$2.5M grant obtained through the CSU Chancellor's Office). Strategies for the 2026-27 application year include:

Collegevine - \$195,000/Year for 50K Leads, 20K Connections, and two Agentic AI Recruiters (live on the SSU admissions web page). Using this service, SEM will focus on expanding warm lead generation with the use of the AI Recruiter for 2026 and 2027.

EdVisorly - \$25,500/Year for unlimited connections (14,000+ to date). EdVisorly focuses solely on community college transfer leads. In addition, EdVisorly is partnering with SSU to automate portions of admissions and transfer credit evaluation. The objective is to increase the speed of processing, free staff to work on more complicated cases, and provide more direct service for prospective students and applicants.

Niche - \$44,990/Year for unlimited connections, detailed lead management, and analysis. Niche is currently the largest supplier of prospective student names in the country and is continuing to grow at a rapid rate.

Encoura - \$34,200 for 30,000 connections, detailed lead management, and analysis.

Using different vendors, Sonoma State should be able to obtain 100K+ warm leads annually for an investment of approximately \$300K/year. Different vendor leads will be focused on different markets within the prospective student population (e.g., local school districts, targeted regions outside the local area, out of state, transfer, etc.). Investment costs for these strategies will come from the CO Marketing and Branding grant for the next two years. Then, Sonoma State would have the opportunity to analyze yield and ROI to determine if costs would be continued after the grant is expended.

3. Paid Advertising

Throughout the pandemic, Sonoma State lost considerable brand recognition among high school students (and their families) outside the local area who were not introduced to SSU through regular outreach and recruitment activities. To increase brand recognition in key recruitment areas across the state, Sonoma State will invest in multiple paid advertising strategies targeting specific regions (e.g., greater Sacramento, South SF Bay Area, SoCal, etc.).

4. Lead Management and Assigned Recruiter Responsibilities

One of the most critical aspects of active recruitment is strategic lead management. An outreach model provides information in the hope that students will apply and enroll. Active recruitment uses multiple lead management strategies to actively convert students through the different stages of the enrollment funnel (app, admit, deposit, orientation, and ultimately enrollment). Sonoma State has been using communication flows (commflows) and drip campaigns (regularly spaced communications from Slate) to send information to prospects, applicants, and admits on a regular basis. To date, however, recruiters have not been assigned to employ lead scoring and focus on different vendors to manage leads and create campaigns specific to different groups of prospective students. Lead management strategies include:

Slate Import, Commflows, and Lead Scoring - All leads, regardless of source, are imported or entered into Slate. Leads are then added to the appropriate commflows for their entry term (e.g., Fall 2026). If no entry term is provided, SEM staff, students, or AI Recruitment Agents will initiate an introduction (email, text, or call) to welcome the prospective student and obtain missing information (e.g., entry term, desired major, housing interest, etc.). Depending on the response from prospective students, the lead activity will be scored based on the level of interest to help determine the next set of scheduled interactions (this function will be developed in Slate starting in the coming year).

Slate Campaigns, Events, and Follow-Up Recruitment - In addition to adding prospective students to the standard commflows, recruiters, student assistants, and AI Recruitment Agents will use Slate to conduct campaigns, advertise events and campus visits, and follow up with students they are recruiting.

Lead Management and Campaigns by Vendor - In addition to Slate, most vendors offer multiple ways to communicate with prospective students and initiate campaigns through their software platforms. Using these strategies is a good way to convert prospective students into applicants. Through their platforms, prospective students indicate an interest in Sonoma State, provide information through their student profile, and often join a community of other students. Beginning with the 2026 recruitment campaigns, the recruitment team will actively manage leads through each vendor, using the analytics & dashboards available from each vendor, and provide reports on the strategies used and associated conversion rates.

Recruiter Support Teams - Recruiters often need help following up with leads who have attended one of their events or with whom they have connected through lead management activities. Our Tour Guides/Student Ambassadors in the Welcome Center form *Recruiter Support Teams* to connect with prospective students and keep them engaged with the university.

Strategic Analyst - Recruiters have limited time. To support recruiters with Slate and lead management through different vendor platforms, it will be critical for SEM to employ a strategic analyst. This position is more than a typical analyst. They will help develop strategies for recruiters, analyze outcomes and vendor ROI, monitor and manage activities in Slate, and provide continuity when a recruiter position becomes vacant.

5. Leveraging Technology to Expand Reach and Automate Processes

Slate Customer Response Management (CRM) System Optimization

To help the recruitment team manage thousands of leads and help convert prospective students through the enrollment funnel, Sonoma State purchased a CRM (Slate) in 2022/23 and has been implementing this new system. SSU invests \$100K/year for Slate. However, Slate is a complex tool, and the recruitment team has been challenged to learn the system, integrate it into their daily activities, and explore the powerful features they are not yet using. Recruiter turnover has also hampered progress in this area, as each new recruiter starts from the beginning to learn the CRM. SEM has created a Slate Squad and partnered with IT to expand the knowledge and effective use of the system. IT has assigned a consistent resource to assist with the Slate implementation and work on new enhancements (e.g., moving Orientation to Slate, implementing lead scoring, etc.). Sonoma State must continue to invest time and resources to optimize the use of Slate throughout the university. A Strategic Analyst position will be critical to the successful use and management of the institution's CRM.

Collegevine Recruiting Agent

To further expand the recruitment team's ability to offer meaningful engagement to thousands of prospective students, Sonoma State purchased the Collegevine AI Agent. This new technology uses generative AI to provide a "human-like" interaction with prospective students and their families. The product supports text, chat, email, and voice connections (in 30 languages). The AI Agent for undergraduate students is named Livy, and for graduate and international students is named Eddy. The AI Agents went live in spring 2025 and can be accessed on the Admissions web page.

EdVisorly Transcript Process Automation (EddyAI)

Like most universities, Sonoma State faces challenges in receiving, processing, and articulating official transcripts for new and continuing students in a timely manner. Delays in the largely manual processes often cause issues for students during orientation and academic advising. In addition, the current process does not facilitate pre-admissions transfer credit evaluation (TCE). To address these issues, Sonoma State partnered with EdVisorly to implement their EddyAI Transcript Automation tool in spring 2025. Automating much of the TCE process, EddyAI can read an unlimited number of transcript formats, course descriptions, and numbering systems, and apply transfer credit articulation rules. The results of the AI TCE will be imported into PeopleSoft, greatly reducing the manual effort involved in TCE processing. Not only will TCEs be more timely and more accurate, but the time saved will also allow staff to focus on increasing the number of course articulation rules, performing more efficient quality control on TCEs, and working more directly with students and faculty to enhance transcript processing. The project commenced in spring 2025 and is expected to go live in 2026.

6. Partnerships, Promise Programs, and Dual Enrollment

To date, Sonoma State has developed Guaranteed Admission partnerships with seven local high school districts representing 24 high schools and academies. In addition, Sonoma State has signed partnerships with Pivot Charter, (four high schools) and AIMS Prep in Oakland. A complete list of partnerships is available at <https://admissions.sonoma.edu/apply/guaranteed-admissions>.

Working with the school districts and community colleges, Sonoma State is establishing several partnership programs. For example, the Petaluma Promise with the Petaluma City Schools aims to establish a pathway from 8th grade through guaranteed admissions at Sonoma State. This program includes dual enrollment. Another example is the Early College program with Rancho Cotate High School, which connects 9th and 10th grade students to Sonoma State through the AVID program and then offers dual enrollment in 10th and 11th grades (again ending in guaranteed admission to Sonoma State). Finally, the Marin Promise is a partnership between Marin Unified School District, the College of Marin, 10,000 Degrees, and Sonoma State to create teacher pathways for students. Several of the guaranteed admission agreements with high school districts include Dual Enrollment Programs.

Sonoma State is focusing on offering dual enrollment opportunities in A-G courses and AP courses. Thus, the university is not competing with local community colleges, primarily offering courses through their career technical pathways. Expansion of partnership and dual enrollment agreements will need to be strategic and assigned specific resources. Partnerships must be actively maintained (work that is often postponed or even abandoned when administrators are busy or their positions turn over). Sonoma State could utilize a retired annuitant or other part-time resource to manage and maintain these partnerships. The individual must be experienced and able to travel to the partner locations at least once per term. In addition, the Dual Enrollment process is currently completely manual and highly cumbersome.

Note: To ensure that Sonoma State can provide a positive experience to partner schools and support processing efficiency in the Admissions Office, the University will need to develop more guidelines and invest in a software tool to support a larger-scale dual enrollment program. Clear guidelines and software support will be critical to automate the dual enrollment process between the school and university, as well as within the Admission Office.

7. Campus Tours, Orientation, and Events

In 2023-24, Sonoma State revamped the campus tour, orientation, and on-campus yield events. Tours are now offered twice on weekdays and once each Saturday. On average, 400 students and families tour the campus each week (many as part of school visits). A new virtual tour should be created using modern technology. Summer Orientation was moved back on campus in summer 2024 (it had remained virtual after the pandemic). For transfer students, a special orientation date is offered each semester, allowing new students who have deposited to register at the same time as continuing transfer students.

The Fall Preview Day and Spring Decision Day events were also restructured to enhance the participant experience and offer special incentives (early admission decisions for Preview Day and early registration for new transfer students at Decision Day). Additionally, the Admitted Student Welcomes conducted in the past two years are being restructured to minimize expense and increase yield from partner schools and pipeline regions.

Lastly, specific events created in collaboration with partnership schools will continue to support increased brand awareness and enrollment yield. The SEM team will continue to work with partner schools to hold events at their locations as well as on the SSU campus. These events are critical to the ongoing success of the University.

Summary

Combined, these strategic enrollment activities can have a substantial positive impact on enrollment. Recovering from the impacts of the past several years will take time. But with an intentional, sustained effort, Sonoma State will grow enrollment and reach a new steady state in the coming years.

Note: The CSU System is currently developing a systemwide Strategic Enrollment Management (SEM) plan, which is expected to be released in Fall 2025. Once the systemwide plan is available, SSU will need to review and align its University SEM Plan to ensure consistency with the overarching CSU strategy.