

**University of California, Santa Cruz
International Recruitment Assessment**

Prepared by CDB Solutions, LLC

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Introduction

CDB Solutions has been charged with assisting the University of California, Santa Cruz in their efforts to assess the potential of increasing their international student enrollment.

CDB Solutions has conducted a review of the university's activity as it relates to its core functions and also to the recruitment of international students. This report is an assessment of the university's market preparedness as it relates to the following variables, which are critical to recruitment success:

- Institutional Positioning
- Strategic Direction
- Location
- Academic Programs
- Enrollment Management
- International Infrastructure
- Student Life
- Housing
- Cost
- Alumni (to come later)
- Brand Awareness

For the purposes of understanding best practices among universities who share characteristics applied to cost, admission standards, total enrollment and international infrastructure, two different competitor sets are being used in this report.

The first set is that of the following schools within the University of California system. Merced was omitted because of its size and newness, and San Francisco was omitted because of its limited level and program offering.

Berkeley	Riverside
Davis	Santa Barbara
Irvine	Santa Cruz
Los Angeles	San Diego

Another competitor set combines schools whose enrollment and freshmen profile are similar to the University of California, Santa Cruz per the National Center for Education Statistics (NCES), and those who have a similar price-point and have achieved substantial success enrolling international students. The following schools are included in this competitor set.

Baylor University
James Madison University
St. Louis University
University of Arkansas – Little Rock

University of California, Santa Cruz
University of Illinois – Urbana
Champaign
University of Wisconsin – Madison

The primary sources used to build the tables related to the comparisons within these competitor sets comes from university websites (to include the University of California), NAFSA: Association of International Educators' Annual Economic Impact Report, and the National Center for Education Statistics' College Navigator tool.

The feedback offered in this document is a result of conclusions based on time spent by the CDB consultant interacting with various university stakeholders on campus, as well as a content review of university-produced collateral. Suggestions made by CDB in this document are done in good faith, in an effort improve the internal capabilities of the university to attract and enroll international students.

Next Steps

The purpose of this report is to create an understanding of the university's qualities to establish a recruitment positioning within the international market. The next deliverable is a strategic plan. This plan will reflect the collective capabilities applicable to international student recruitment, and offer strategic direction to help the university recruit international students. It is comprehensive in nature and leverages the university's Global Footprint: Enrolled Students, Alumni, Faculty, EAP Students, and University Partnerships. It is designed to be an international recruitment handbook with a focus on the immediate present and near future (1-5 years). The delivery of this report will be in the early fall.

Perspective of an International Recruiter

The author's perspective is that of an international recruiter whose success will not only be measured by international enrollments, both undergraduate and graduate, but also by the expansion of the university's global brand. The international recruiter is an economic development officer, a sales person for a university, seeking to develop healthy, productive, relationships in target markets.

Successful international recruitment is a shared goal among stakeholder groups across campus. Strategies to ensure success rely upon the synergy of these groups.

International recruitment activity is both direct and indirect.

Direct recruitment activities to increase international enrollments include traveling abroad to target markets for the purposes of developing pipelines with various "school choice" drivers, those influencing the decision making of international students who may choose to come to the United States to earn a degree. Direct recruitment activities that can help to develop this pipelines include but are not limited to: facilitating relationships with secondary school counselors, attending education exhibitions, training education agents, forming relationships with officials who work for domestic and foreign government agencies, and running marketing campaigns. Direct recruitment activity normally involves expenditures that are measured directly by international enrollments. The success of this type of activity is usually reliant on the university's admissions office.

Indirect recruitment activities increase the global brand recognition of the university by leveraging opportunities in the international education sector. These opportunities will create revenue and develop institutional relationships with foreign universities, corporations, non-governmental organizations and government agencies. These relationships can result in short-term programming that is delivered to constituents from target markets and/or help the university expand its brand awareness in those markets. Indirect recruitment activity normally involves fee-based or mobility agreements. The success of this type of activity is often reliant on the offices of international education, administrators and faculty, and to a lesser extent, the university's admissions office.

Variables Discussed

An international recruiter needs to have an understanding of their university's areas of strength. They also need to understand how their strengths play to the international marketplace when compared to the global competition.

The following variables are, in the author's opinion, important areas to examine when determining the likelihood of international recruitment success. These variables are considered to help the international recruiter understand the sales pitch and to identify operational and logistical strengths and weaknesses.

Institutional Positioning – a summary of the university’s classifications, accreditations, program offerings, enrollment profile and any third-party features which help to determine the university’s market value and help the university understand which international students are most likely to be attracted to campus.

Strategic Direction – a summary of support for international recruitment among key stakeholder groups on campus as expressed in university documents, organizational charts, budget allocations and interviews.

Location – a summary of the regional benefits used to attract international students, the level of accessibility of campus, and cost of living.

Academic Programs – a summary of degree and non-degree programs as it relates to the demands of the international market and the availability of courses. Also includes access to programs.

Enrollment Management – a summary of international operations as it relates to the recruitment of international students, admission standards, and the processing of applications and immigration documents, for degree-seeking students. Also includes the financial incentives and transitional services.

International Infrastructure – a summary of the university’s international support systems with a focus on student services, outreach and logistics.

Student Life – a summary of the academic, experiential, athletic and social programming available to international students on campus.

Housing – a summary of on-campus and off-campus housing options for international students, scholars and dependents as it relates to cost, availability and regulations.

Cost – a summary of the university’s price point and scholarships against those of the two competitor sets.

Brand Awareness – a summary of the university’s visibility on international recruitment web sites, Google analytic reports of university web page views, and a summary of university branded collateral.

Executive Summary

As it pertains to international recruitment success, the University of California, Santa Cruz (UCSC) possesses many of the characteristics needed to attract and retain international students. In the past year, the university has proven that it can attract international students and is expecting an unprecedented international enrollment in the fall of 2013. On its own merit, the university is an attractive destination for international students and their dependents.

However, the university has its challenges, and the most glaring is the lack of direct and indirect international recruitment compared to competitors within the University of California system. The level of international activity at UCSC is dwarfed in comparison to that found at sister schools. It is basically a comparison of the combined efforts of academic units, centralized international education offices and extension offices of UC peers versus the efforts of UCSC's undergraduate admissions office. For years, this imbalance has given others an advantage in building a global brand and in building recruitment pipelines.

The international efforts of competitor schools within the UC system often involve multiple offices, with independent responsibilities. While an admissions office may be responsible for matters related to outreach and processing, in many cases the non-admissions related international activity falls under the umbrella of a singular report. In international education circles this person may be referred to as the Chief International Officer (CIO). The absence of this position at UCSC is likely a reflection of the lack of organized international activity at the university, just as the presence of this position at sister schools is justified because of the international activity on sister campuses. A strategic approach to international education certainly would help any international recruiter do their job more effectively.

The majority of the direct international recruitment being done at the university is related to incoming undergraduates. The new international enrollments are due to the contributions of the undergraduate admissions office. An increase in recruitment activity, a new approach to application review and an undergraduate scholarship for incoming international students, has resulted in unprecedented SIR numbers. This effort has significantly reversed the trend of low international student enrollments.

The undergraduate population greatly outnumbers the graduate population and thus services and programming for international students is skewed towards undergraduates. The Campus Orientation Programs provides incoming international undergraduates with services like airport pick-ups and both short-term and long-term orientation programs. In College 9, programming is available to

international undergraduate students who choose to live with domestic undergraduates and who have the option of living on the international floor. While these services and programs are excellent, they are limited in range to first-year undergraduates. A centralized office could build on the success of these programs and expand their reach to international students and scholars at all academic levels.

The university is a faculty-driven campus. The role of the Faculty Senate and committees is taken very seriously and has been admirably active in developing strong positions on key issues, to include international recruitment. The result of the work the members of the CAFA and CIE committees, is an increased focus on international enrollment numbers. It has also led to increased involvement of non-admission personnel in the area of undergraduate admissions. The lines of responsibility have been blurred and while the intent of non-admissions personnel is good, uninvited involvement in direct recruitment activity can be counter productive. The undergraduate admissions office has proven it can recruit international students with this recent intake and should be afforded the respect to see if continued success will be sustained. A good international recruiter needs to maintain focus on the external world of international student prospects and pipelines, and involve campus stakeholders when opportunities arise. They should not need to concern themselves with external pressure beyond their direct reports.

It is possible that the undergraduate admissions office can find more space within the UC application system to elongate the period of international student recruitment each year. The recruitment cycle has largely been focused on the period between securing enrollment for the fall and the end of November, when the UC application portal closes. However, other schools within the UC system have year-round international recruitment operations, largely due to the success of extension offices and the organized work of faculty supported by a centralized international office. Sister schools are recruiting international students to their intensive language classes and summer programs, with intakes throughout the academic year. The result of these efforts has created pipelines of students who are waiting to enroll and who, in some cases, are already on campus. The undergraduate admissions office does not have these resources to leverage and for right now should look to find opportunities to review and accept applications in a rolling admissions system, within the UC system. Likewise, it should consider offering informal admissions decisions to international applicants as they are completed and not wait until the UCSC portal officially announces them. This will allow the international recruiter to implement a yield strategy sooner and possibly even in person during spring travel.

The graduate programs do not face the same kind of application obstacles that are present for undergraduate admissions via the UC system. International graduate applicants can use an UCSC application and are not forced to apply during a small window of time, unlike international undergraduate applicants. The graduate programs do not struggle to attract international applications, and the international graduate application totals from 2012 were the highest since 2006. However, the

acceptance rate for international graduate applicants has averaged 18% over the past six years. Recently, acceptance rates for international applicants to master's level programs have been below 10%. There are opportunities for the university to attract fully funded, academically qualified students, from sponsored-student programs abroad. These students can help the university reach its goal of increasing the number of PhD candidates, mandated by the UC system. A closer look at the application review process of international students would be helpful to understand why so many international applicants are being denied. This will help the recruiter develop a standard to promote to students and benefactors of the government-sponsored applicants.

In summary, while California is a competitive market, its popularity with international students gives any school within the state access to domestic recruitment pipelines. Judging by web hits, UCSC is already being considered by the global marketplace despite the absence of a comprehensive international recruitment strategy. The university itself is a draw, with respected academic programs, relevant degrees, and a culture based on providing academic and cultural support. The undergraduate admissions office has dramatically improved international undergraduate enrollments despite the imbalance of international activity associated with its competitors. The university is attracting international graduate applications but these candidates do not appear to be competitive. The expansion of the International Education Office and a CIO to steer international education policy will help international recruitment efforts. The university is at a point where international enrollment gains and a focused outreach should facilitate an internal discussion about a comprehensive international strategy.

Variable Highlights

According to the Carnegie Foundation, the University of California, Santa Cruz is classified as a comprehensive Doctorate-research university with very high research activity. According to the Institute of International Education, in 2012, slightly more than 325,000 international students (42%) were enrolled in similarly classified schools, in the United States.

The university at this point is highly interested in international education and international recruitment. This is measured by the level of work done by committees and those directly working with international students, especially in undergraduate education. However, there isn't a university-wide vision for international education and in some cases reports covering areas like student services and retention are glaringly omitting the impact of international students on campus. The university's administration and organization chart does not contain a position for a high-level Chief International Officer, something that exists at peer universities inside and outside the UC system.

California is a popular destination for international students and offers the university natural recruitment pipelines. There are more degree seeking international students enrolled in California universities and colleges than in any other state. At the four-year and two-year level there are large numbers of international students. With three major airports within two hours of campus (SFO, OAK, SJC), international students can access the region with ease. Airport pickups are offered to first-year students. The UC system is well known throughout the world and its brand is one that can be leveraged for international recruitment. The city and campus are relatively safe environments for international students.

The university's degree programs are relevant to the market. Of the top ten most popular areas of study, the university offers instruction in each degree area. Intensive English is considered an area of study by the Institute of International Education and is among the most popular subject areas for international students largely because of the government-sponsored programs in Saudi Arabia. At the time of this writing the university was not offering an Intensive English Program but was partnering with ELS to offer a voluntary ten-day immersion orientation.

Because the UC system operates with a central undergraduate admissions system there is not a great measure of deviance in admission requirements between the schools. There are 14 faculty-determined selection criteria. What little room for difference that does exist is found in TOEFL scores and the level of campus selectivity. Therefore, among the schools within the UC system, there is not a competitive advantage or disadvantage for UCSC as it relates to application requirements and international student recruitment.

The success of the undergraduate admissions office this year reverses years of low international enrollments at UCSC. According to a report prepared by University of

California Office of the President, published in August of 2011, between the years 2006-2010, the average international freshmen acceptance rate for the UC campuses was 43% and UCSC was 48%. However, where the average yield rate for the UC campuses (accepted international students who enroll) for international freshmen was 16%, the yield rate at UCSC was 7%. If the university had yielded at the same rate as the average across campuses, it would have more than doubled its international freshmen enrollment.

Between AY 2011 and AY 2013, the acceptance rates of international freshmen applying to UCSC increased from 50% to 62%. In one year, the acceptance rate rose 22 percentage points (2012 to 2013). On average, the acceptance rate for international freshmen applications to UCSC during this period was 51%. The UC average acceptance rate for the same demographic during this period was 48%. The three-year SIR rate for admitted international freshmen at UCSC was 7%, while the SIR rate system-wide for the same demographic during this period was 21%.

International graduate applicants are not being admitted at a high rate. Between 2006 and 2012, the university received over 7,600 international graduate applications, according to internal documents. Of these applicants, 1,369 have been admitted for an acceptance rate of approximately 18%. Recently, acceptance rates among international Master's degree applicants have been below 10%.

The International Education Office is not staffed to expand its operations should the university decide to use it for more than visa compliance and study abroad. In 2009, the IEO organization had eleven full-time positions, nine of which were filled. There were also eight student workers in the office. As of this May, the office had nine full-time positions, three of which are currently vacant and another that will be in the fall. Recent hires have increased the staffing levels.

An expansion of the international office might come with a Dean, Executive Director, reporting directly to the Campus Provost/Executive Vice Chancellor. It is the most common format among the competitor sets with five universities employing the reporting structure: UCLA, UC-Berkeley, UC-Davis, University of Wisconsin, University of Illinois. Another, UC-Riverside, has proposed this reporting structure in recent internal planning documents.

The inherent system of colleges, the focus of College Nine, and the programming featuring the nature beauty of Santa Cruz are marketable advantages to assist in the recruitment of international students. The college system provides international students with academic support. College Nine is an added layer of programming for international students, and programming tied to the outdoor advantages can ease integration and provide a contrast to their native environments.

Students are given the option of listing their housing preference. They are encouraged to choose more than one in case their initial preference is not available. If possible, the university should try and ensure that any one College is not

saturated with international students, or worse, that international students from one country are all in one location. There are numerous disadvantages in having too many international students from one country living together and if the university has a system that can help prevent it, it should be implemented.

The advertised costs of attending UCSC put it firmly in line with its UC competitors but make it more expensive than any in the other competitor set. Twenty-one percent of all international students enrolled in the United States are receiving financial assistance from their university or college. The undergraduate Dean's Award offers qualified international students a scholarship package that is competitive amongst the UC system schools, and should be maintained.

If web hits are any indication, the international recruiter well on their way to moving away from the discussion of "Who we are" and can focus on "What we are about". The university's website over the past year has attracted hits from over 225 countries worldwide. (Note: Google Analytics likely considers Territories as Countries) The university provided access to their web data using Google Analytics. Web hits to five main web properties analyzed. The activity was for the period between October 1, 2012 and June1, 2013.

What it means to be a Challenger Brand

The University of California, Santa Cruz is a leading research university striving to be internationally recognized for the quality of its research, programs, faculty, staff, and students. It is one of thousands of schools in the United States wanting to do the same thing and one of ten in the number one university system in the number one destination state for international students in the United States.

International recruitment is a competition. It is not a love fest where we (UC sister schools) are all in it together for the spirit of education. There are winners and there are losers and there are some who win more often than others and some who lose more often than others. Given the mandates and payouts by the UC system regarding non-resident enrollments the margin of winning and losing can be easily measured. According to the UCSC Office of Planning and Budget statistics in January of 2013 (as seen in the Committee on International Education Report), the university lost \$3.5 million in unclaimed Nonresident Supplemental Tuition between AY 2007/8 and AY 2010/11.

This added financial bonus is what makes international students so valuable despite the fact that international student applications to UCSC represent about a third of all graduate applications and less than two percent of all undergraduate applications in any given year.

The university's degree-seeking international student population represents less than 1% of the overall degree-seeking student population. According to data from the University of California's Office of the President (UCOP), in the past decade the university has seen a steady decline in degree-seeking international enrollments. Competitors within the University of California system have experienced growth in international, degree-seeking enrollments, especially in the past five years.

Yet, in the past year, the university's undergraduate admissions office has worked hard to increase international, degree-seeking enrollments and the university will experience unprecedented growth as a result. The momentum from this success is substantial and creates a forward-leaning mentality for the international recruiter.

This yearlong project, beginning with this document, will be tremendously successful if we collectively take the approach that we are a challenger within our own system, state and country. We will aggressively push our own agenda and be selfish about our own success.

One thing that will become clear is the need for synergy among academic and administrative units. The university will succeed or fail collectively. Modesty and humility are needed to deliver a high standard of customer service that can become a favorable point of differentiation. Any request for collaboration or resources comes with a payout. Likewise, patience and respect of reporting lines and job responsibilities is important, too. Everyone can win.

For an international recruiter representing a challenger brand, the focus must be on leadership, speed, and customer service. Strong leadership is helpful, as is the leanness and flexibility to move quickly and differentiate UCSC to our international prospects. This report is a reflection of UCSC through that lens.

Institutional Positioning

According to the Carnegie Foundation, the University of California, Santa Cruz is classified as a comprehensive Doctorate-research university with very high research activity. According to the Institute of International Education, in 2012, slightly more than 325,000 international students (42%) were enrolled in similarly classified schools, in the United States.

The university is part of the prestigious University of California system, and is accredited by the Western Association of Schools and Colleges.

According to the Higher Learning Commission of the North Central Association, the University of California, Santa Cruz offers 58 undergraduate degree programs (excluding concentrations) and 38 graduate degree programs. According to the university's Office of Planning and Budget's third-week census report in fall 2012, there were 17,404 enrolled students at the university. According to the self-study submitted by the university to the Institute of International Education, there were 242 degree-seeking international students enrolled at UCSC at some time during the AY 2012-2013.

Several external publications and academic associations have honored the university. Included among recent awards are:

- Top two ranking for research influence by the *Times Higher Education* World University Rankings
- Ranked 11 in the *Times Higher Education* World University Rankings (2013), among universities under 50 years old
- 2013 National Medal of Science award winner
- 2012 Benjamin Franklin Medal winner in Electrical Engineering
- Top 75 "Best Value Public Universities" by the *Princeton Review*
- Placed 11th in the Leiden Ranking, a measurement of scientific performance of universities worldwide.

Strategic Direction

A successful international recruitment operation, one that attracts degree-seeking international students and market opportunities for the university, is characterized by the cooperation of several academic and administrative offices across campus. The synergy between these stakeholders across campus is often produced by mutual gain or consequence. A comprehensive international strategy can result in increases in enrollment profits, grants, and cash-based programs. Further benefits include diversification of thought in the classroom, an increase in degree value and an expansion of university brand awareness. The sacrifices and support (fiscal and personnel) required to be successful should be the result of leadership and direction from senior administrators. International recruitment success is dependent on good recruiters and great administrators.

This project is a sign that the university is committed to international recruitment and to providing academic and social support to international students and scholars. It is the most recent step forward, preceded by work done largely by committee.

Stakeholder groups involved in promoting international student recruitment include the Committee on International Education (CIE), the International Recruitment and Graduate Recruitment Team, Committee on Admissions and Financial Aid (CAFA), and the work being done in Enrollment Management offices, the International Education Office and College 9/10. Members of the Faculty Senate and Executive Committee have also vocally expressed their support for increasing international student enrollments.

Also, the “5 for 2015” initiatives, developed by Campus Provost/Executive Vice-Chancellor Galloway’s herself, does include a call to “Increase Non-Resident Student enrollment”, and international students are part of this population.

Yet, the idea of increasing international student enrollments and preparing for the consequences of doing so, has not completely permeated the university culture and is not expressed in university-wide strategic publications.

The work done by the Strategic Futures Committee in 2004, examining growth in the areas of enrollment, academic programs and capital projects did not include direction related to international recruitment/enrollment. The corresponding 2005 LRDP primarily focused on the impact of California students on campus.

The 2013 report published by the Undergraduate Student Success Team, focusing on the retention of first-year students recognizes that one of the two major factors in first year drop out rates is “having a lower level of satisfaction or feeling of belonging”, but does not specifically address the international population who leave behind their familiar social structures. While international students will benefit from the possible implementation of the recommendations, the absence of any

mentioning of international students reflects the general “newness” of this population within the university community.

Leadership and direction for international recruitment is focused in the Division of Undergraduate Education, which oversees the Enrollment Management and the International Education Office. Senior administrators within each of these offices have been supportive of increasing undergraduate international enrollments. The focus of many of the above-referenced reports has been on undergraduate education. Right now, the international leadership for an entire university is housed within an office with a focus on undergraduate education.

In addition to not having a comprehensive strategic vision for international recruitment, the university does not have one for international education. While it is possible to measure the return on an investment in international recruitment through enrollments only, those returns can be greater with a comprehensive approach to international recruitment to include attracting grants, non-degree programs, academic partnerships, donations, and the expansion of internship programs. This level of activity increases the brand awareness of the university, making it easier to control messaging and cheaper to recruit international students. It also requires leadership.

CIO Title	AVC	VP	AVP	Dean	Director	Chair
Berkeley	X					
Davis		X				
Irvine				X		
Los Angeles		X				
Riverside				X		
San Diego				X		
Santa Barbara					X	
Baylor University						X
James Madison University					X	
St. Louis University					X	
University of Arkansas- LR					X	
University of Illinois - UC			X			
University of Wisconsin		X				

CIO positions within competitor set

AVC – Assistant Vice Chancellor VP – Vice Provost AVP – Associate Vice Provost

The university does not have a Chief International Officer (CIO). The highest ranked administrator with daily responsibilities dedicated entirely to international education is Anne Butler, Director of the International Education Office. It is not uncommon that the highest-ranking international administrator oversees an international office, with primary responsibilities to serve the outgoing domestic students and the incoming international students and scholars. As we will see later in the section related to international infrastructure, the expansion of the efforts to increase activity (including recruitment) in international markets is associated with the expansion of international offices and a higher positioned international officer.

In summary, the university at this point is highly interested in international education and international recruitment. This is measured by the level of work done by committees and those directly working with international students, especially in undergraduate education. However, there isn't a university-wide vision for international education. A comprehensive strategy will help the university close the gap on its competitors who use their combined international efforts to increase brand recognition abroad.

Location

Getting there

The University of California, Santa Cruz is located in Santa Cruz, California (pop. 56,000). The hillside campus sits above the city located less than 2 hours from San Francisco, Oakland, Silicon Valley and San Jose.

Daily international flights easily access the airports in San Jose, San Francisco and Oakland. Major hubs throughout the United States also access them in case a student cannot reach the west coast directly.

First-year international students who participate in orientation programs are offered airport pickups. All other international students are directed on how to get to campus via the university's web site. This information is provided via a hyper link from the IEO website.

International Students

According to the Institute of International Education's 2012 report on student mobility, *Open Doors*, the state of California was the number one destination for international students in the United States last year. Approximately 103,000 were enrolled at institutions in the state, an increase of 6.7% from the previous year. International students and their dependents are estimated to contribute over \$3 billion to the California economy each year. (Note: The Open Doors survey is completed by each participating university. The total international enrollment can include degree-seeking students and non-degree seeking students.)

The top five institutional destinations account for slightly less than 25% of the total post-secondary international population in California, last year. These schools, in order, are: University of Southern California (9,269), University of California, Los Angeles (6,703), University of California, Berkeley (5,004), Stanford University (4,426), Academy of Art, San Francisco (4,414). Of the top five institutional destinations, none has a pre-award price point below \$35,000.

There are over 40 two-year institutions with international enrollments exceeding 50 students.

Over 20 individual campuses in California have between 1,000 and 3,000 international students. The majority of post-secondary schools in California have international enrollments under 250. UCSC is one of 24 schools in California enrolling between 250 and 500 international students in 2012.

Countries of Origin

The top five countries of origin account for nearly fifty percent of all international students enrolled in California post-secondary schools. China is the number one place of origin for international students in the United States, and it is true for California as well. In 2012, Chinese students represented one-quarter of all international students in California. South Korea, India, Taiwan and Japan are the remaining countries in the top five places of origin for international students in California. The closeness of the Pacific coast to Asia is likely a contributing factor to why the most of the top countries are in the Far East.

At UCSC, according to data provided by the university, China, India, Mexico, South Korea and Canada are top five countries of origin among enrolled graduate students, since 2004. Japan, South Korea, China, Mexico and Great Britain are the top five countries of origin among enrolled undergraduate students since 2004. China is overwhelmingly the number one country of origin among enrolled international students during the same period of time. Combined, the list of top three countries of origin for the international students in California mirrors that of UCSC.

University of California System

The University of California system has been attracting international applications at a steady increase over the past 20 years. According to published reports by the University of California's Office of the President, international freshmen applications grew from 1,223 in 1994, to 6,791 in 2010.

In 2012, approximately 23,000 international students attended institutions within the UC system, according to data from the Institute of International Education. These students represent about one-quarter of all international students in the state.

The system members are competitors but collectively the brand is globally recognized for academic quality. The UC system affords the university an added boost in terms of brand recognition with "school-choice" drivers. The university system participates in education exhibitions throughout the world and is also represented at major international education conferences. An international recruiter will benefit from the system brand but need to find key points of favorable differentiation to promote.

Safety

Judging by crime reports published by the City of Santa Cruz Police Department (SCPD), the city is relatively safe. An SCPD report published in December 2012 indicated 432 individual cases of violent crime (Homicide, Rape, Robbery, Aggravated Assault). By comparison, according to the Annual Uniform Crime Report published by the Federal Bureau of Investigation, in 2012 there were 500 violent crimes in Berkeley, 110 in Irvine, 18,547 in Los Angeles, 1,389 in Riverside, and 5,529 in San Diego. (Note: Statistics included in the FBI report are reported by local

police departments. The city of Santa Cruz is not represented in the FBI report because the population of the municipality is too small. However, the statistics represented in the SCPD report are the statistics that would be reported to the FBI.)

According to 2011 crime statistics published by the university police department, there were 13 individual cases of violent crimes on campus in 2011. By comparison, in 2011, there were 115 individual cases of violent crime at UC Berkeley, 63 at UC Irvine, 86 at UC Los Angeles, 35 at UC Riverside and 53 at UC San Diego.

In summary, the state of California is the number one destination for international students in post-secondary schools in the United States. At the four-year and two-year level there are large numbers of international students. With three major airports within two hours of campus, international students can access the region with ease. The university offers airport pickups to first-year undergraduate students attending orientation. The UC system is well known throughout the world and its brand is one that can be leveraged for international recruitment. The city and campus are relatively safe environments for international students.

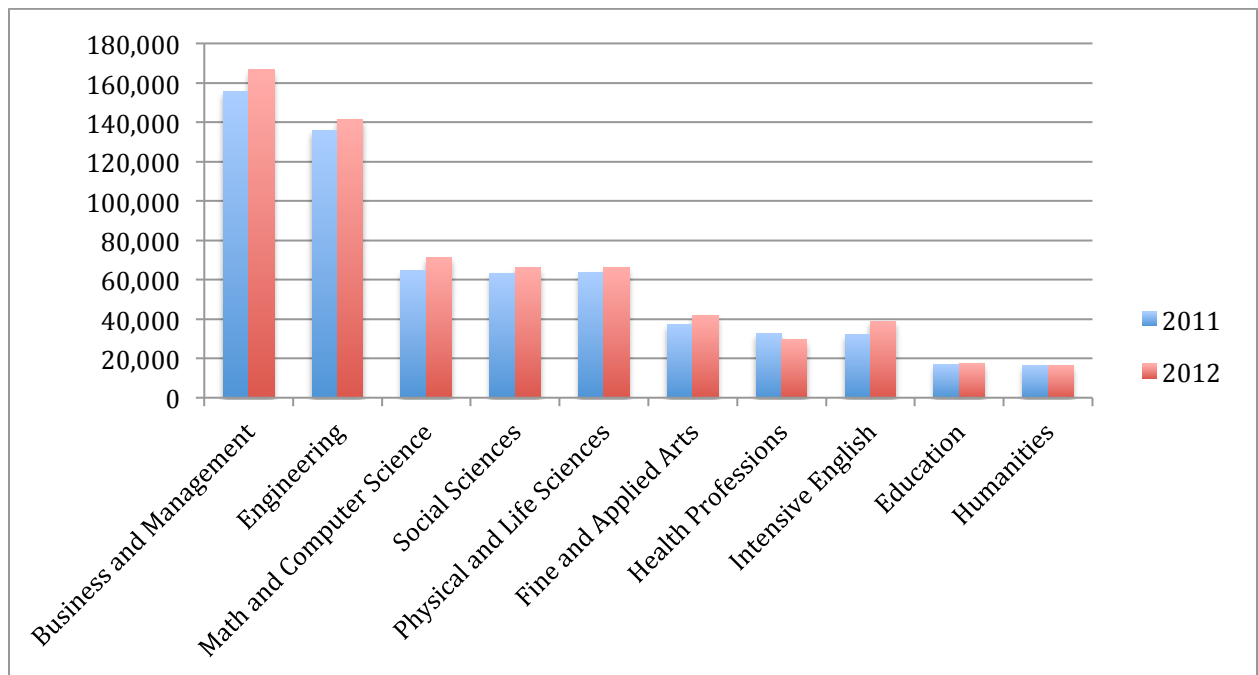
Academic Programs

Of the 764,000 plus international students enrolled in degree programs at institutions within the United States, 49% are enrolled in undergraduate programs.

According to the Institute of International Education's 2012 report *Open Doors*, over forty percent of all international students attending schools in the United States are studying in the fields of "Business and Management" or "Engineering". These two fields have produced more graduates than any other area for the past century. This trend looks like it will continue as both areas are seeing year to year growth.

Of the top ten fields of study for international students detailed in the chart below, the University of California, Santa Cruz offers degrees in nine of the top ten subject areas. At the time of this writing the university was not offering an Intensive English Program but was partnering with ELS to offer voluntary bridge programs.

The fastest growing subject areas are in "Intensive English" (20%), "Fine and Applied Arts" (12%), "Math and Computer Science" (10.5%), and "Business and Management" (7%). Among the top ten subject areas for international students seeing a decline in international enrollments only "Health Professions" suffered a substantial decrease (-9.2%), in enrolled international students.



Top Ten Fields of Study for International Students

Source: *IIE Open Doors, 2012*

According to data provided by the university the most popular programs (majors/applications received) among international students since 2006 are:

Undergraduate

Business Management/Economics
 Computer Science
 Psychology
 Biology
 Film and Digital Media

Graduate

Computer Science
 Electrical Engineering
 Computer Engineering
 Physics
 Chemistry

It is worth noting that last year, at the graduate level, the Economics program received 125 international applications, the third highest total of any graduate program.

The following chart identifies countries where the subject area is the most popular choice among their students in the United States (by percentage). It helps to know which subject areas are most popular in each market.

Areas of Study	Countries of Relevance
Business	Vietnam, Indonesia, Russia, China, Hong Kong, Brazil
Engineering	Iran, India, Malaysia, Turkey, Pakistan, Nigeria, China
Physical/Life Science	Nepal, Nigeria, Russia, Malaysia, China, India
Math/Computer Science	India, Nepal, China, Turkey, Iran, Pakistan, Turkey, Malaysia
Social Sciences	United Kingdom, Hong Kong, Turkey, Canada, Japan, Germany,
Health Professions	Canada, Nigeria, Nepal, Thailand, South Korea, India
Intensive English	Saudi Arabia, Japan, Venezuela, Colombia, South Korea, Turkey
Education	Canada, Taiwan, Turkey, United Kingdom, South Korea, Mexico
Humanities	Germany, France, United Kingdom, Colombia, Japan, Russia,
Fine and Applied Arts	Taiwan, South Korea, Indonesia, Brazil, Venezuela, Canada, Japan

Areas of Study by Country Relevance
 Source: *IIE Open Doors, 2012*

There are two possible issues with the academic program offering at UCSC as it relates to international recruitment. The university does not have an on-campus intensive English program for degree-seeking students, and the business degrees are not AACSB accredited.

The university is seeking to recruit and enroll classroom ready students who can not only meet or surpass the admission requirements but also demonstrate a proficiency in English that will help them to be successful. However, the absence of a program means that it hands other institutions in California an advantage. International students are not likely going to leave an English language program at another institution for a degree-program at UCSC. And, while the ELS center downtown can provide classes to students, it is limited by physical space and does not offer on-campus housing, something degree-seeking students prefer in order to integrate easier.

Also, UCSC Extension is located in Silicon Valley. That location may be good for non-degree seeking international students looking for continuing education or larger cohorts seeking certificate coursework, but it is not an ideal place for students the university is trying to help in an effort to have them enroll at a later date. Finally, there are some very good students in government-sponsored programs that still need work on their English. The students in these programs are given access to scholarships that include funding for intensive English programs. These are students who may come from public secondary schools and therefore they may not have a great deal of exposure to English. These fully-funded students may prefer and need language training and are likely to look to their university of choice for this service and a degree, all in one.

Government-sponsored programs also prefer AACSB accredited business majors. Program administrators at the home ministries and embassies maintain approved-program lists designed to direct students to which universities are supported by their governments. Each university will then have a degree program listing usually posted on a government website. It is possible that a government-sponsored program will approve degree programs in biology and engineering, but not in economics or business management. This is of possible consequence because degree programs in the area of business are the number one area of study for international students in the United States, and because these students are fully funded by their governments. The administrators of these programs will not automatically dismiss non-AACSB accredited programs so it is best to reach out to the nearest program administrator to discuss this issue.

Accessibility

Degree-seeking international students are paying extra a surcharge for being non-residents. At UCSC, they are paying supplemental nonresident tuition. Undergraduates are paying a premium and are going to have to compete for spots in courses both inside and outside their major. Many students will have the expectation of graduating in four years or less. Access to classes in sequential order is essential to this goal. It is important to understand the potential disadvantages in being an international freshman at UCSC when it comes to initial course registration.

The university has a comprehensive undergraduate advising system. It includes central College-based generalists and program advisors. The first-year objectives will assist freshmen in integration into the UCSC system and help them articulate their academic vision. However, the delivery methods featured by adviser-initiated contact include two contact points that are not favorable to international students because of distance.

The first contact period is in May/June, right after SIR. During this period the content included in the contact is summarized as: "Initial advising information: choosing and enrolling in classes, how to access advising, university requirements and policies, etc.". The delivery method for this contact period includes: "Distributed online, via email, and occasionally via mail for fall incoming class (Colleges and Departments).

The second contact period is in July and the content is the same as the first period. However, the delivery of the content in this period includes: "Group and individual advising at Summer Orientation (Colleges and Departments).

Advising staff should guarantee that advising information from period one is mailed to international SIRs. This information can act as a yield piece and will guarantee receipt of content by the parents and students.

Most international freshmen will not attend the second contact period, as it is cost-prohibitive since their visa will not allow them to enter the United States outside of 30 days of the start of the term. They are not inclined to pay for a trip over for orientation. It is why the international student orientation occurs right before classes start.

It is important that international freshmen continue to are not denied the right of registering for academic classes at the same time as other freshmen. If content in either the first two contact periods helps to facilitate this registration process it should be delivered to international students at the same time as domestic students, even if they cannot make the second contact period.

Also, if the university prioritizes students in terms of course registration, it should make sure its international degree-seeking students have access to classes before international visitors. These students are paying a premium and will continue to enhance the university with their legacy post-graduation. It is these students who will help construct the "word of mouth" campaign in their home countries.

In summary, when it comes to advising and course registration degree-seeking international students should not have to be at a disadvantage because of where they live and the costs associated with being on campus during orientation periods designed for domestic students.

Enrollment Management

Introduction

Success in international admissions is about speed and ease. An institution wants to eliminate roadblocks that may get in the way of issuing an I-20 to a student who wants to attend their school and is academically qualified. The I-20 allows the student to seek a visa. A strong international recruitment operation is one that clearly states the admission requirements, is responsive to correspondence from prospects, and can quickly process completed applications. A strong admissions office can accommodate international applications year-round, and can deliver an I-20 to an accepted student within two weeks of receiving the completed application, proof of English proficiency and a complete confidential financial certificate. Obviously, this ideal format has to be adjusted when applied to the rules of the UC application system at the undergraduate level.

Freshmen Undergraduate Requirements

In order to be able to be considered for admission to UCSC and receive an I-20, an international student is asked to submit the following application materials to admissions and the IEO:

Application:

- A completed University of California application (on-line) with self reported courses, grades and test scores
- Personal Statement

Post admissions and historically post submission of Statement of Intent to Register (SIR)

- Translated high school transcripts (self-report first, then final)
- Proof of English language proficiency (IBT: 80, IELTS: 7.0)
- Photocopy of the passport photo page
- SAT (not subject)/ACT Assessment and Writing Test
- Confidential Financial Certificate, including appropriate bank statement(s)

UC Competitor Set

Because the UC system operates with a central undergraduate admissions system there isn't a great measure of deviance in admission requirements between the schools. There are 14 faculty-determined selection criteria. What little room for difference that does exist is found in TOEFL scores, levels of selectivity by campuses, and SAT subject test requirements, normally associated with individual degree programs. Therefore, among the schools within the UC system, there isn't a competitive advantage or disadvantage for UCSC as it relates to international student recruitment. Advantages such as cost and financial packages are discussed later in this document.

However, the system itself does place stress on the efforts of UCSC to recruit international students in the following ways:

- The strict deadline for the fall quarter does not allow for the application habits of students from public school systems (less counselor support) and those from some government sponsored students. These students tend to apply later in the academic year. Nor do they allow for students who may be late to learn about UCSC through the university’s outreach efforts. This deadline is a limiting factor in a market that has a 365-day recruitment cycle.
- While the university has changed its policy to now issue I-20s to students at the time of their acceptance with a completed financial certificate and proof of English proficiency, this can create challenges for students who did not report their courses and/or grades correctly on the self-reported application. Upon receipt of the final official transcript each course is reviewed. If the student no longer meets the conditions of admission as expected of all students, their admission and I-20 will be canceled. The university should consider requesting preliminary transcripts up front to minimize risk of issuing an I-20 without a transcript from the school and minimize late cancelations.

Non-UC Competitor Set

	Deadline	Fee	TOEFL	IELTS	SAT/ACT	Essay	App	Aid	Recs
UCSC	Nov. 30	\$80	80	7	Yes	Yes	Online	Yes	No
UIL	Jan. 2	\$75	79-100	6-7.5	Yes	Yes	Online/ Download	Yes	No
UWC	Feb. 1	\$44	95-105	6.5- 7.5	Yes	Yes	Online	Yes	Pref.
BU	Feb. 1	N/A	76	6	Yes	Yes	Online/ Download	Yes	Opt.
STLU	Dec. 1	Free	80	6.5	Scholarship	Optional	Online/ Common App	Yes	Rec.
JMU	Apr. 1	\$50	80	6.5- 7.0	Scholarship	Yes	Online/ Download	Yes	Yes
UAR	May 30	\$50	79	6.5	Scholarship	Yes	Online/ Download	Yes	No

Source: University web sites

Highlights of comparing international admission requirements among cohorts in this competitor set are:

- UC/UCSC has the earliest application deadline of November 30. The latest deadline is May 30 at the University of Arkansas – Little Rock.
- UC/UCSC has the most expensive application fee of \$80. The average application fee for those who charge and post and application fee is \$55.
- A minimum TOEFL and IELTS that is right in line with the cohorts. Some individual programs at the University of Illinois –UC, and the University of Wisconsin – Madison have TOEFL/IELTS minimums as high as 105 and 7.5, respectively.
- Four schools make either the SAT or ACT mandatory, two require it only if applying for a scholarship, and one makes it optional.
- All institutions have an online application. Four have an international application that can be downloaded and one is using the Common App and supplement.
- All of the institutions in this cohort offer merit-based scholarships to international freshmen applicants.
- Only one school mandates the submission of recommendation letters. Three schools do not require them and two make it optional (with UW preferring them but not requiring them).

Aside from the obvious constraints of the UC application system, there is nothing in the in the admission requirements of universities within this cohort that puts UCSC in either a position of strength or weakness.

Universities in both cohorts do require the completion of specific secondary courses in order to be eligible to apply as a freshman. The list for UCSC is fairly standard when compared to other institutions.

The admission decision is a critical piece of the international recruitment operation. While admission criteria can be the same among institutions, the delivery of the admission decision and the delivery of the I-20 will vary. Schools with rolling admissions and the ability to issue an I-20 throughout the year will have a competitive advantage over those who have a set time of the year for announcing decisions. The UC system notifies applicants of admission decisions during the month of March. Universities who can give these decisions earlier have an advantage.

Graduate Admissions Requirements

In order to be able to be considered for a UCSC I-20, an international student is asked to submit the following application materials to admissions and the IEO:

- Application Fee \$100

- Statement of Purpose
- Completed UCSC graduate application
- Undergraduate transcripts (self-report first, then final)
- Proof of English language proficiency (IBT: 83-85, IELTS: 7.0)
- 3 letters of recommendation
- Academic program supplemental information
- Photocopy of the passport photo page
- Program related standardized test/subject test
- Confidential Financial Certificate
- Bank Statement

The university offers 36 graduate degree programs and each of these programs will make a decision based on their unique qualifiers. The base information above will be required and standard of competitive universities within both cohorts.

The university's graduate programs have their own application and are not reliant upon data downloads from the UC system or its schedule. In talks with graduate advisors it was estimated that decisions (open after October 1) are normally made within two months and that most decisions are communicated in February or March. However, some graduate program application deadlines go as late as April. Any financial awards are also communicated at the same time. Individual programs set their own standardized test minimums (the recruiter will do well to know them).

Undergraduate International Application Stats

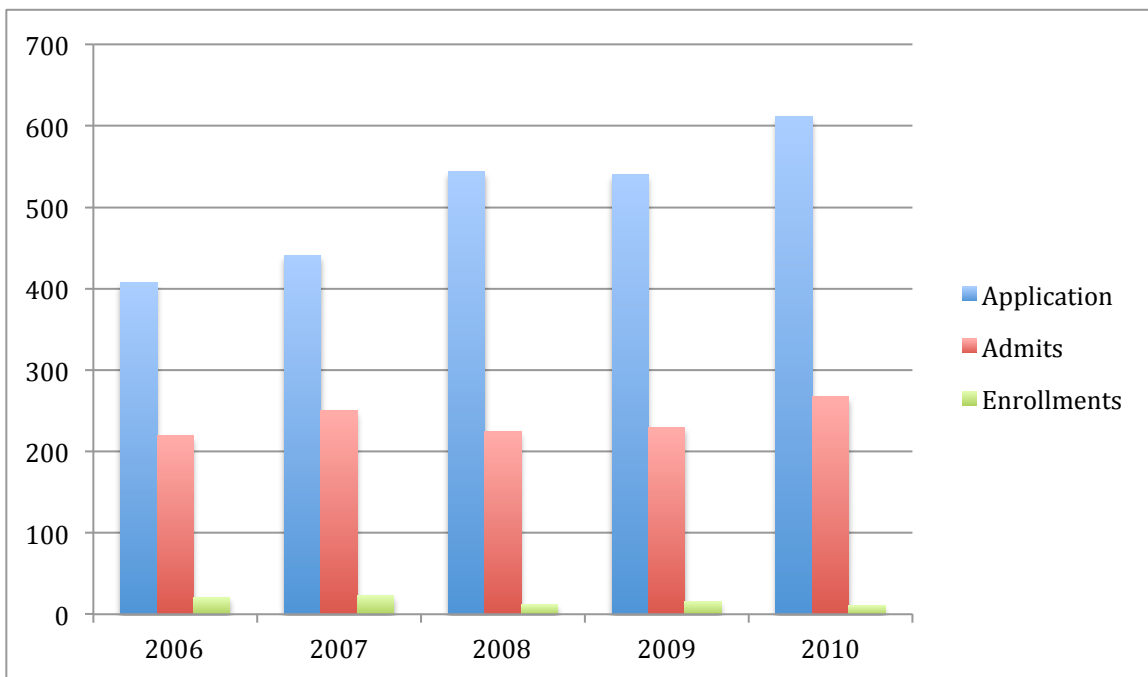
Historically, the university has struggled to yield international students. A small sample (between 2006-2010) shows that the university was not able to convert its acceptances into yields even though its acceptance rate was even with the UC system as a whole.

Year	UC Average Admit Rate	UC Average Yield Rate	UCSC Admit Rate	UCSC Enrollment Yield Rate
2006	47%	18%	54%	10%
2007	45%	18%	57%	9%
2008	41%	17%	41%	5%
2009	38%	14%	43%	7%
2010	44%	13%	44%	4%
2011	55%	23% SIR Yield	50%	4% SIR Yield
2012	44%	20% SIR Yield	40%	5% SIR Yield
2013	44%	21% SIR Yield	62%	12% SIR Yield

Comparison of First Year International Acceptance/Yield Rates

Source: *UC Office of the President, August 2011 and Table 2 Admit Table and Table 2.2 SIR Table 2013 Releases*

According to a report prepared by University of California Office of the President, published in August of 2011, between 2006-2010, the average international freshmen acceptance rate across the UC campuses was 43% (excludes the highest and lowest rates). At UCSC, the average was 48%. However, where the average campus yield rate for international freshmen across the UC system was 14% (excludes the highest and lowest rates), the yield rate at UCSC was 7%. If the university had simply yielded at the same rate as the UC system, it would have doubled its international freshmen enrollment during this period of time. Of course, this is easier said than done but the point is that the university has been able to attract international applications but has not been able to convert them even though other universities within the UC system did.



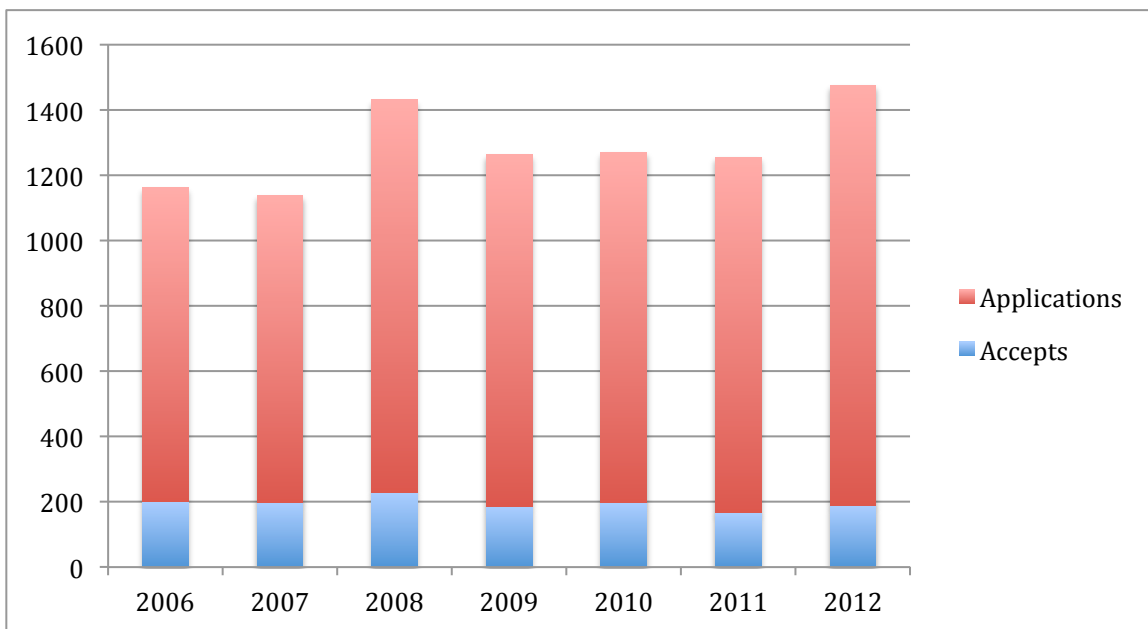
UCSC First Year International Applicants, Acceptances, Enrollments
 Source: First-year applications, admits and enrollments by ethnicity
UC Office of the President, August 2011

Recently (2011 to 2013), the university increased its applications, acceptances and SIRs, according to recent data from UCOP. During this period, international applications have increased by 227%, from 767 to 2,508. Acceptances have increased by nearly 296%, from 381 to 1,504. SIRs have increased from 15 to 179, a three-year increase of over 1000%. Importantly, the university's acceptance rate for international freshmen applications is now 60%. This compares favorably to the average UC rate for international freshmen at 44%.

It is important to understand that the university will always compete within the UC system when it comes to SIRs. International applicants can apply to more than one UC campus when submitting their application. Ultimately, they are going to choose one. The SIR rates for UCSC are therefore always going to be impacted by students who choose multiple UC schools when applying. The UCSC SIR rate for international undergraduate applicants has quadrupled in the last three years (12%) but still lags behind the UC system-wide rate average during the same period of time (44%). However, these SIR rates can be positively influenced with an increase in outreach efforts.

Graduate International Application Stats

Until recently, graduate programs were far outpacing the undergraduate programs in terms of international applications received. Between 2006 and 2012, the university received over 7,600 international graduate applications, according to internal documents. Of these applicants, 1,369 were admitted for an acceptance rate of approximately 18%.

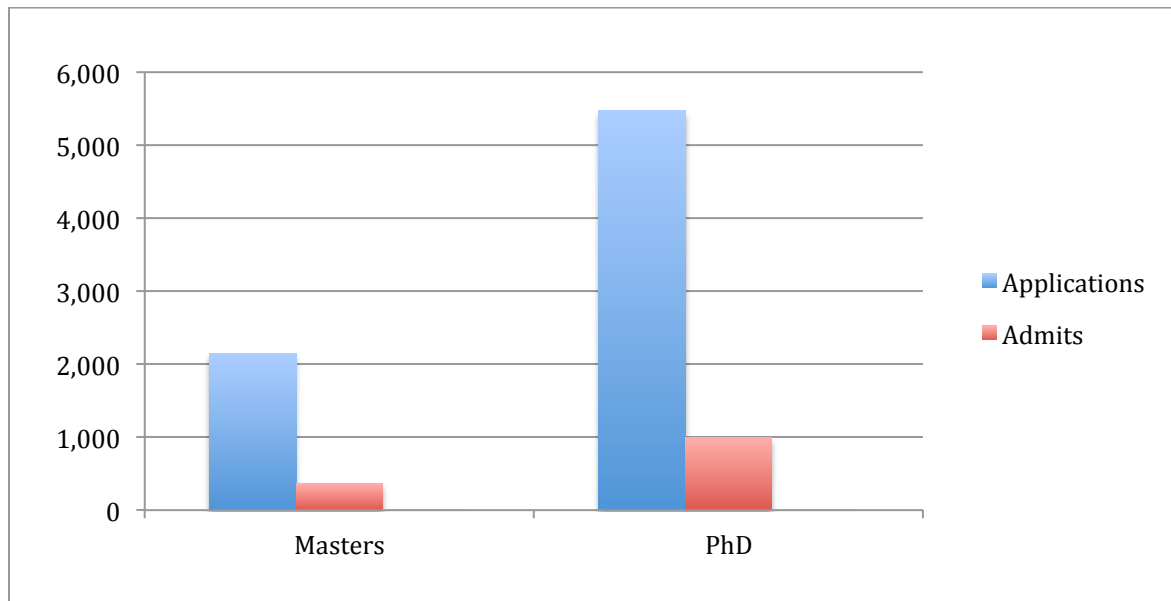


UCSC International Graduate Applications, Acceptances

Source: *UCSC Institutional Research*

The applications increased from 2011-2012 and the 1,286 international graduate applications received last year were the highest since 2006. However, the acceptance rate last year was 15%, down from a high of 21% in 2006 and 2007. In a conversation with administrators in the graduate office and academic programs, it was disclosed that about 3,200 graduate applications were received for the 2013 fall quarter and that 500 offers were extended. That would reflect an acceptance rate of

15.6%, so it appears that international graduate applicants are being accepted at a rate comparable to domestic graduate students.



Graduate Applications by Level, 2006-2012

The chart above reflects the breakdown of international applications by academic level, between 2006-2012. The Doctorate programs are more popular than the master's programs and are attracting applications by more than at 2 to 1 margin. Acceptance rates for master's programs dropped markedly in the past two years from averages of above 20% to those below 10%. Ph.D. acceptance rates have been maintained at the 18% rate.

Application Processing

As mentioned earlier, at the undergraduate level the university is limited by the time it can automatically accept applications, and the deadlines for delivery of decisions. There are exceptions to these rules but the bulk of the international undergraduate applications will fall within the UC standard of November.

The period between the second week of December and the end of February is reading time for the admissions staff. The university is able to process international applications internally, though UC Berkeley and UCLA readers will read and score applicants applying to UCSC and their campuses. Frosh decisions are communicated mid-March.

Once a student has been admitted, submitted a full confidential financial certificate proving they have the funds to cover their first year, including bank statement(s) and proof of English proficiency, they are passed along to the International

Education Office to issue the I-20 that will allow the student to get their visa to study at the university.

Given that the undergraduate process is largely dictated by the UC process, an increase in international undergraduate students (without giving away a full ride to everyone) would appear to come down to two major initiatives: a) increasing the international application volume and b) creating and implementing a comprehensive yield strategy. Both of these initiatives are doable and new strategies will be implemented this fall.

At the graduate level applications are processed and organized at by the central office. They are then passed along to the departments for evaluation and decisions. Once graduate applicants have stated their intent they are also passed along to the IEO for I-20 processing. It would be interesting to dig deeper into the process. Would the academic programs like to be the ones who translate transcripts or could that be a central function of the graduate programs office or a central credential office for both undergraduate and graduate? Are there steps to take that can reduce the decision time to six weeks instead two months? Is the School of Engineering going to implement rolling admissions? Why are the admit rates so low? These are issues we will continue to address in follow up conversations.

Staffing

In the past two years, the university has invested in primary international recruitment activities to include secondary school visits, online fairs, and education exhibitions. They have purchased agreements with lead generation companies and have produced marketing materials strictly for the international audience. At the time of this report the university was demonstrating its continued commitment to international recruitment with the replacement of a vacant position and the hiring of a new international admissions positions. One position will have primary out of country responsibilities and the other will have responsibilities with international students attending California community colleges. One is at the Assistant Director level coordinating all of the international efforts. These positions will fall under the undergraduate admissions office, in the outreach area.

It is understandable that the admissions office would like to take a team approach to international recruitment. The recent loss of a key member of the international operations this year appears to have encouraged the belief that it is better to have shared responsibilities when it comes to international recruitment. The university has designated the Assistant Director as the primary international recruiter. They should act as the first point of contact for international inquiries, do the majority of the international travel and manage the communication flow with international prospects. This position needs a face to go along with the job, someone who will represent the university well and take a lead role for growing the international student enrollment at UCSC.

New Student Services

Enrollment Management should be commended for anticipating the needs of new international undergraduate students. The orientation office, under supervision of this office, has developed programming to help these students with their initial transition to UCSC. The university now offers two orientation options before College orientations for international students: a 3-day option and a more comprehensive 10-day immersion option for students who seek more university academic skills and transitional services to the campus and community. Additionally, the university is developing academic support to new international undergraduates to help them with mandatory testing related to reading and writing skills.

Going forward, the university should offer similar orientation programs for new international graduate students, exchange students, and visiting scholars. Perhaps a centralized program from the International Education Office would meet this need since the orientation office is under an office whose primary focus is undergraduate education.

Admissions Web Pages

Prospective students are going to get the majority of their information from the admissions website. According to Google analytics the University of California, Santa Cruz admissions web page had over 49,000 visitors from outside the United States between October 2012, and June 2013. The information on this page should be as purposeful as possible.

The international undergraduate admissions web site is very well done. It is informative, directive, and provides useful information for multiple “school choice” driver populations.

There are two initiatives that would add to the quality of the site. First, the university should provide translation of the information into the languages of the top student markets, to include: Arabic, Cantonese, Korean, Mandarin, Portuguese, Spanish, Turkish and Vietnamese. By doing so we will be able to influence parents, high school counselors, agents and administrators of government-sponsored students. Second, the university should remove generic emails and personalize the section related to international admissions. It should feature admissions personnel and give their real work email addresses. This level of customer service is what is needed when you are a challenger brand.

International Infrastructure

International recruitment is often perceived to be the domain of the admissions office. But a sound strategic plan will take into account the support needed to help incoming international students find personal and academic success. It will also promote the support of international outreach efforts of stakeholders on campus whose work will increase the brand awareness of the university abroad, and make it easy for foreign entities and domestic NGOs to identify the school as a potential partner.

UCSC is now at a stage where it is going to invest in a strategic outreach to recruit students, and this fall will feel the impact of those early efforts as a record-number of degree-seeking international students arrive on campus.

At universities like UCSC a centralized international office can harness the global activity of its faculty, administrators, alumni, local business partners and students for the common good. Universities with strong international leadership have people who are in essence diplomats for their institutions, looking for opportunities and managing international operations.

Also, when one looks at the funding sources for international students, it will notice a large increase in governments and universities as the primary source of funding. Representatives from these sources rely on the personal contacts found within a centralized office to maintain strong relationships in the areas of student placement, student mobility, and academic partnerships.

These centralized offices frequently contain the following departments: international student and scholar services, education abroad, and immigration services. Some (through Extension or not) also contain departments of academic partnerships, international admissions, and intensive English.

At the University of California, Santa Cruz, the International Education Office is responsible for helping to meet the needs of incoming international students, domestic students studying abroad, in a custodial role. It is an advising and compliance office. The primary responsibilities of the office lie in SEVIS compliance and administrative duties related to student mobility. The office staff has been hard at work, serving almost 2,000 international students and scholars since 2006, according to university reports. Despite the volume of work, the office has done a very good job of protecting the university and maintaining compliance.

The International Education Office is not staffed to expand its operations should the university decide to use it for more than visa compliance and study abroad. In fact, current staffing levels are lower than that four years ago. In 2009, the IEO organization had eleven full-time positions, nine of which were filled. There were also eight student workers in the office. As of this May, the office had nine full-time

positions, three of which are currently vacant and another that will be in the fall. However, recent hires have increased the staffing levels.

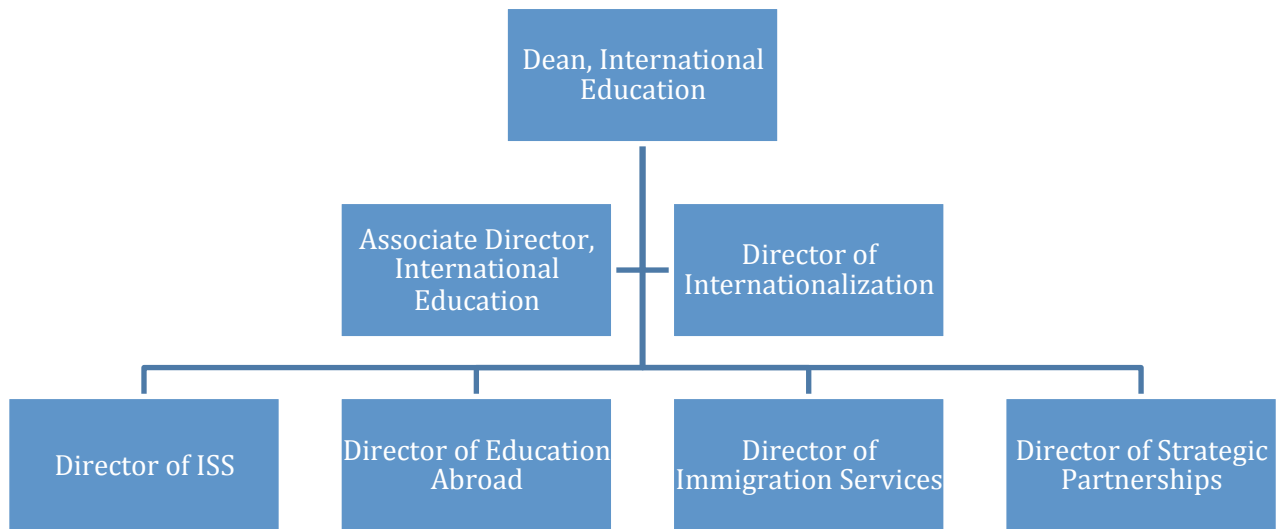
The result is not only a strain on existing services but also means that the office is unable to facilitate programs the university needs as a challenger brand. It does not do airport pickups for new students, new student orientation, experiential learning programming for international students, teach intensive English courses, and it cannot provide logistical support for academic programs and faculty interested in global partners. Other international offices within the UC cohort do provide these services and also have grant/research departments, public relations and fund raising operations. This competitive advantage for other UC schools positively impacts international student enrollments.

The university needs to decide how best to not only serve the needs of international students and domestic students going abroad, but also how to best support the expansion of the Santa Cruz brand in an effort positively impact international enrollment numbers. In its current form, the IEO is not the international heartbeat of the campus or international community, yet it could be best positioned to serve the entire international population, at UCSC.

Within the competitor set the role of the international office on campus varies. At its most basic existence, it is a resource for international and domestic students and scholars, assisting with visa-related matters and facilitating study abroad opportunities. At its most advanced, it offers the same function and acts as a clearinghouse for all international activity while assisting in campus initiatives in the areas of research, grants, partnerships, fund-raising and economic development. The University of California, Santa Cruz is in the early stages of evolution on this scale.

In the UC system institutions are very comprehensive in their approach to international education. What the on-campus academic or administrative offices do not do, the Extension office does. In some cases both groups are highly engaged. UCSC no longer has an active Extension program in the area of international education though continuing education classes are marketed to international students and visitors.

The university is still feeling the effects of recent budget cuts. It may not be reasonable to create multiple centers to focus in on international education. Yet, the international marketplace is a good investment and the universities success in international recruitment is going to justify new expenditures in this area. This will most likely have to be done without the benefit of an on-campus (or nearby) Extension office. Therefore, it may be best to expand the current IEO.



Proposed Organization Chart for International Education Office

This basic re-organization would keep in place the existing services and will likely enhance them since the clear delineation of responsibilities would allow members of the organization to focus on their main priorities. A description of the leadership positions and reporting lines follows.

Dean, Executive Director, International Education – reports to the Campus Provost/Executive Vice Chancellor. This position is the Chief International Officer and is the primary international representative for the university. They are charged with driving the international vision, internationalization, and maintaining relationships with internal stakeholders as well as major partners abroad.

Associate Director, International Education – reports directly to the Dean, Executive Director, International Education. This position is in charge of day-to-day operations of the office to include fiscal and personnel issues. Each of the director positions for the departments with the exception of internationalization would report to the Associate Director.

Director of Internationalization – reports to the Dean, Executive Director, International Education. This position is responsible for campus-wide internationalization to include the development of guidelines, and the creation and implementation of an internationalization strategy.

Director, International Student Services – reports to the Associate Director. This position manages the non-immigration support services for international students and scholars. This office would develop and administer orientation for all new, incoming students, develop and administer programming related to integration and

experiential learning and be the point person for emergencies involving international students and visiting scholars. This office would also liaison with academic programs and the faculty Senate.

Director of Education Abroad – reports to the Associate Director. Manages the EAP partner programs, the faculty-led programs and third-party programs. Also oversees all advising of incoming and outgoing students. Works with academic programs to provide direction and guidelines for new programs.

Director of Strategic Partnerships – reports to the Associate Director. Develops and manages external relationships in the areas of dual degree programs, research, grants, training and development programs, international internships and government sponsored-student programs. This person would also be a liaison to the University Relations office managing an international alumni network and donations.

In addition, the office staff would consist of an office manager, fiscal manager, and student workers. Student Services, Immigration Services, Education Abroad, and Strategic Partnerships would require full-time staff.

This model is proposed based on the current state of international activity as it relates to students, faculty and staff and the needs of a still relatively modest international student population. The shift in reporting structure to the Campus Provost/Executive Vice Chancellor is not a reflection on the existing leadership. It is common for the CIO to report to the Provost. It is the most common format among the competitor sets with five universities employing the reporting structure: UCLA, UC-Berkeley, UC-Davis, University of Wisconsin, University of Illinois). Another, UC-Riverside has proposed this reporting structure in recent internal planning documents. It is possible that UCSC will one day have an international infrastructure that matches some of the UC institutions. However, it appears that step is a bit too far given the financial climate and the relative newness of internationalization and recruitment efforts. This step is still ambitious but is not too far from what the university has tried in earlier years when international enrollments could not justify expansion of services.

The university's new Director of Strategic Partnerships would likely have the greatest influence on international enrollment gains. While at a smaller scale compared to UC sister schools, the organized, collective approach to expanding the university's global reach will complement the efforts of the international recruiter. Likewise, the international recruiter's efforts will be the new business funnel for the Strategic Partnerships office. Therefore, the establishment of this office would be the recommended first step towards establishing an office to capitalize on our increased international recruitment activity and the development of external partners.

At this time, it is not recommended that the university explore an Intensive English

program on campus. The Santa Cruz area does not demand this, the competition in Silicon Valley offers an easy alternative, and the school is focused on classroom-ready international students. However, the university should consider pipeline programs, especially those with established, independent programs. Companies like ELS, Kaplan, and Education First have global recruitment networks and locations throughout California. They have the ability to offer visa documentation to international students who can come to the United States for intensive English training and standardized test preparation. These are prospects for UCSC even though, at first contact, they may not meet our language or standardized test requirements. Good partners like these will provide a good landing point for students we meet on the road who cannot gain an initial admission.

Fees

International education does not have to be a drain on fiscal resources. There is revenue to be made in the areas of tuition, short-term programming, and grants. Additionally, it is common for user fees to be administered to international students to support programming and services like airport pickups. Other fees may be applied to mandatory services related to incoming exchange students or incoming scholars. This practice is also common, not only within the UC but throughout the United States. As the university increases its international enrollments it may want to consider a fee structure to help pay for services that would keep it on pace with competitors.

Student Life

At some point every student enrolled in a university or college is going to lean on the institutional staff and programs for assistance and enrichment. The disparity of reliance upon the offerings of a campus between commuting and non-commuting students varies. But, international students who leave not just their homes, but their home countries and support networks, will be more dependent on the campus-related programming than perhaps any other student group. Thus, it is important to for the university to promote the services and support they can provide to enrolled students.

The university college system is the foundation for student life on campus. The 10 living/learning communities provide all participating students with immediate grounding through orientation programming, team building exercises and academic/social programming that is mutually of interest to those who have chosen their college. A wide range of activities to include sports, dining, arts, and music can be found within the facilities located at each of the colleges.

College Nine is unique in that it provides an environment for the cohabitation of domestic and international students in an effort to promote *International and Global Perspectives: A World of Possibilities*. This college is one where the efforts to understand the world and its issues are put into practice. Students who are affiliated with either College Nine or Ten are eligible to apply for a spot in the International Living Center (ILC). There, the International Living Center and the International Affairs Group help facilitate discussion on global issues. According to university collateral, each year, 25-30 countries are represented at the ILC.

The university has plenty of programming to help an international student acclimate to life at UCSC. Among the highlights are:

- OPERS – offering programming taking advantage of the gorgeous nature beauty of Santa Cruz, the state and nearby states. These programs can help students integrate while also introducing them to one of California’s greatest assets: natural environment.
- Over 100 student organizations and programming provided by SOAR.
- Student media
- International mingles
- Greek Society
- Intramural sports
- Cultural Arts and Diversity Resource Center
- On-campus and off-campus shuttle system to easily access events in town.

In summary, the inherent system of colleges, the uniqueness of College Nine and the programming centered on the nature beauty of Santa Cruz are marketable advantages to assist in the recruitment of international students.

Housing

While it is possible to find students who will say something negative about housing, overall, the university is well positioned to provide on-campus housing to international students. In fact, the integration of American and international students in College Nine, the variety of food services, and the quality of housing, are all selling points to prospective international students, their parents, and foreign governments.

The university should expect the majority of international students to participate in on-campus housing plans. International students studying at the undergraduate level, and whose tuition their parents pay for, will likely want to stay on campus. The parents will understand the convenience and added safety measures of staying in the dorms. International students studying at the undergraduate level, and whose tuition governments pay, will likely prefer to stay off campus, if possible. They will have the money to afford off-campus housing and maybe even transportation. They will not prefer to live within the structure of the dormitories.

One exception to the idea of government-sponsored students living off-campus is the female applicant from a traditional culture. In this case, she may prefer, or her family may prefer, for her to live in a single unit, in a housing complex that is single sex. UCSC is well positioned to help this student, with single-room housing available for both men and women. It is also possible however, that this type of female applicant will be joined with her “brother”, possibly a family member or friend who is there to provide a connection to home.

Normally, graduate students will prefer the cheaper housing option. However, the university provides housing that would appeal to these students and to those who may choose to bring a dependent. In California, according to a report published by the Institute of International Education and NAFSA, over 7,000 spouses and 4,500 dependent children accompanied international students to their campus of choice. In some cases government-sponsored students will be given money to pay for their dependents as part of their scholarship. It is a marketable advantage that the university can provide such nice places at competitive rates. Of course, the university’s Community Rentals Office can help students who do wish to live off campus and can even provide a database of local rental units.

As the school engages its academic programs as part of the external strategic plan, and considers summer programming, housing space during the summer will be critical. Typically, summer programs involving foreign university partners or non-governmental grants, require the boarding of groups of students rather than individuals. Programs like these may require that these students be placed together in a particular unit. The university should have a conversation about how many units can be made available during the summer and when they may need to be taken off-line for upkeep. The university may also want to prioritize spaces for the programs that may result in degree seeking students down the road.

Finally, a thought about the College housing system as it relates to choice and placement. Students are given the option of listing their college preference. They are encouraged to choose more than one in case their initial preference is not available. If possible, the university should try and avoid a situation where any one College is saturated with international students, or worse, that international students from one country are all in one location. There are numerous disadvantages to too many international students from one country living together and if the university has a system that can help prevent it, it should be implemented.

In summary, the housing stock, options and services are good for international recruitment and should be promoted as a competitive advantage.

Cost

According to research published by Hobsons and RuffaloCody, tuition and finances issues are a leading concern and influencer when considering which school to attend in the United States. Paying for school is not the only concern or motivator but financial aid packages was listed among the top application drivers among students surveyed as part of the research report.

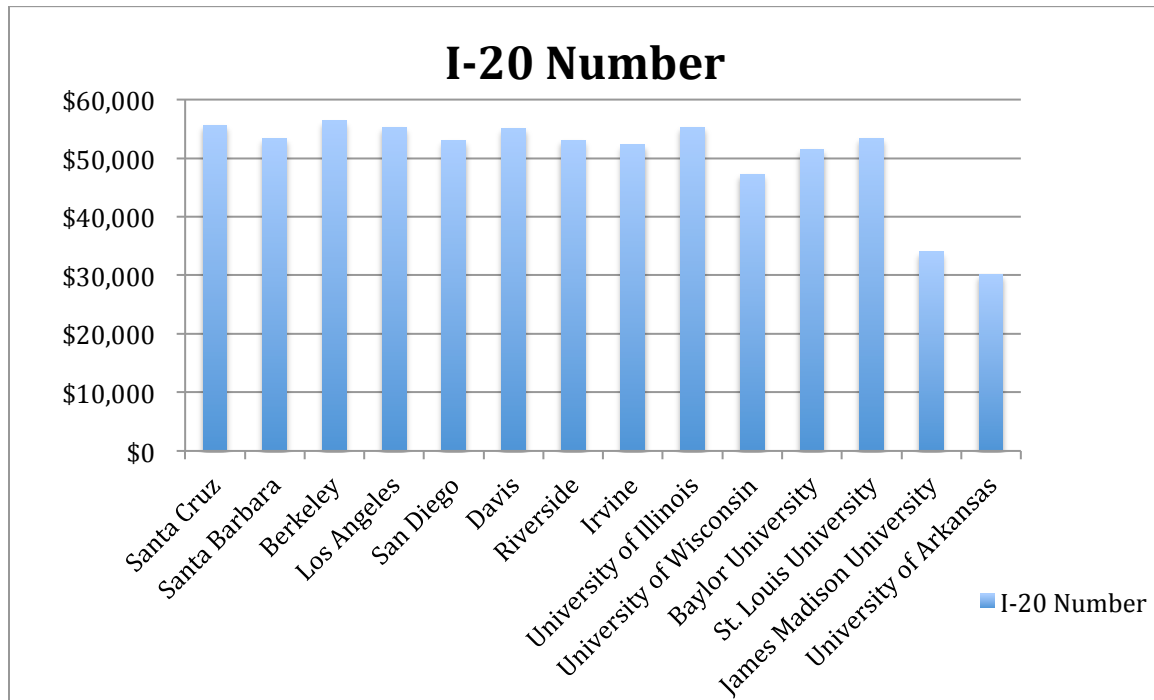
Application Drivers				
PLEASE RATE THE IMPORTANCE OF EACH OF THE FOLLOWING FACTORS IN DECIDING WHERE TO APPLY. *				
Factor	All	Undergraduate	Graduate	
Financial aid is available to me	78%	78%	79%	
Opportunities for work experience, internships, cooperatives, or practicum	74%	73%	75%	
Value of education for the price of tuition	73%	73%	74%	
Tuition and fees for my program	71%	72%	70%	
Access to high-quality libraries and computing facilities	70%	71%	70%	
Campus safety	68%	69%	68%	
Visa application support	67%	70%	63%	
Research or teaching assistantships are offered to me	67%	63%	73%	
Institutional responsiveness to my inquiries	65%	65%	65%	
Guidance during the admissions application process	64%	68%	59%	
Strength of academic program in my area of interest (e.g., program size, awards received)	63%	63%	63%	
Academic advising/counselors	62%	63%	61%	
Opportunities to do research	61%	57%	67%	
Overall academic reputation of the university	60%	61%	60%	
Health care/medical services	58%	58%	58%	
Faculty guidance and mentoring	56%	56%	57%	

* Percentages reflect students who ranked a factor as extremely important (4 on a scale of 1–4). The survey queried students on 48 application drivers; the top 16 are included in this report.

A student applying to the University of California, Santa Cruz is asked to submit a confidential financial certificate, along with proof of English proficiency, in order to obtain an I-20. This document is needed to prove to the university and the United States government that they have the funds to support themselves while attending school. Typically, a student must show enough funds to cover tuition and fees, lodging, books, insurance, food, and undefined living expenses for the first year. Tuition is not the only factor in establishing proof of ability to afford the costs of studying at the University of California, Santa Cruz. Collectively, these costs add up to the I-20 number. Once a student demonstrates their ability to cover their costs, the university issues them an I-20. Alternatively, students may receive a DS-2019, if they will be coming to the country on a J visa.

Many institutions in the United States offer financial assistance to their international applicants. These students may be offered a scholarship upon submitting their

application, or they may earn one after they have entered their major. Some students are offered positions within academic or administrative units and are compensated for this work. Schools who do this will develop a reputation for doing so. Thus, their advertised price point will be seen in actuality as less. A university should give an honest assessment of how much money it has to give and the frequency with which it will be given. When comparing the costs of attending peer institutions, it is important to consider the possibility of financial aid. Because costs like lodging, books, and food tend to be set (within \$9-12K), tuition is the most important variable and is the most likely cost to be adjusted.



Source: University Websites, 2013

The advertised I-20 price point for UCSC places it among the \$4,000 range of the most expensive and least expensive UC schools. It is more expensive than all of the other competitors in the non-UC set, to include the University of Illinois and the University of Wisconsin.

It is difficult to understand the impact of a scholarship offer on an international undergraduate as it relates to competition from others. We simply don't have access to records at other institutions to determine the real results. Each year, the Institute of International Education and NAFSA, to measure the economic impact of international students on state economies. This study combines the enrollment data (self-reported) from the Institute on International Education's *Open Doors* report, plus tuition and expense figures from Wintergreen Orchard House and analysis from the Director of Information Services at Indiana University's Office of International Services. This report estimates the aid packages within each state and

at each institution. The most recent report listed the average aid package per student for California at 23.7% of tuition. However, this report is skewed toward graduate students who are more likely to receive institutional funding.

According to the 2012 *Open Doors* report, 21% of international students enrolled at universities and colleges in the United States were receiving financial support from that school. The undergraduate Dean's Award offers qualified international students a scholarship package worth \$20,000 over four years. The timing of the creation of this award appears to coincide with an increase in the number of international undergraduate enrollments. It is not unreasonable to believe that it has positively impacted new enrollment numbers.

A web content analysis of awards for incoming international freshmen revealed that the Dean's Award at UCSC is in line with competitors within the UC system. It appears that only UCLA (range between \$2,000 and \$10,000) and UC, Davis (\$7,500) have higher award amounts.

The university's price point means that not every international student market will be good for recruitment. As in the United States, the tuition will simply be beyond the capabilities of many families. However, the UC system is among the most expensive for non-California residents yet it remains popular among international applicants. The UCSC tuition is comfortably within the range of other UC schools and the Dean's Award is as well.

Brand Awareness

The university is building a global brand through the efforts of the international office, central administrators and faculty. It has alumni in multiple countries, over fifteen percent of each graduating class is going abroad, and university partners are found in five countries. These relationships should be leveraged in the strategic recruitment plan. But in terms of connecting with prospective students, the university website will be among the top tools for recruitment.

Sources of Information	
WHICH SOURCE WAS MOST EFFECTIVE IN INFLUENCING YOUR COLLEGE SEARCH PROCESS? (TOP TEN ANSWERS OUT OF 21 CHOICES)	PLEASE RATE THE CREDIBILITY OF EACH OF THE FOLLOWING SOURCES DURING YOUR COLLEGE DECISION-MAKING PROCESS.*
Institution's Web site	Institution's Web site 87%
E-mail from the institution	E-mail from the institution 85%
School rankings	University admissions counselors/recruiters 83%
International education Web sites	School rankings 81%
Print mail from the institution	Teachers 78%
My friends and family	International education Web sites 77%
EducationUSA centers	My advisor/school counselors 76%
University fairs in my country	EducationUSA centers 74%
Phone call from the institution	Print mail from the institution 73%
University admissions counselors/recruiters	Phone call from the institution 71%
	Printed school directories 68%
	University fairs in my country 67%
	Campus visits to other countries 66%
	Online/virtual tours of a campus 66%
	My friends and family 65%
	Agents/education consultants 64%
	Government agencies in my home country 62%
	Online communities or social networks 52%
	Facebook 51%
	Video clips or YouTube 49%
	Skype or live video streaming 48%

* Percentages reflect students who ranked a source as credible or extremely credible (3 or 4 on a scale of 1-4)

The internet is the number one search tool for international students looking for degree programs. This is especially true for students looking to earn a bachelors degree because while there are 90,000 international students in American community colleges with a chance to transfer to undergraduate programs, the majority of prospective undergrads from overseas will never be close enough to a campus in order to visit and have a personalized learning environment. The university should also realize that no one outside the university has the ability tell the University of California, Santa Cruz's story with the credibility that they have.

Printed collateral and information on the web site will be most trusted source of information for international students looking to apply to UCSC.

The university provided access to their web data using Google Analytics. Web hits to five main web properties analyzed. The activity was for the period between October 1, 2012 and June 1, 2013. Results are below in the chart.

Web Property	Visits	Countries Represented
IEO Main	8,103	153
USCS Admissions Main	47,989	201
UCSC Main	716,074	227
Grad Division Main	39,663	173
Alumni Main	1,576	109

The top countries for visits to these pages were from China, India, Canada, the United Kingdom, Philippines, and Puerto Rico.

In addition to these referring sites, international students will also use a handful of sites to conduct their searches. Here is how the University of California, Santa Cruz measures on those sites.

Website	Presence
College Board	Yes
College Confidential	Yes
Peterson's	Yes
USjournal.com	Yes
Zinch	Yes
Internationalstudent.com	No
Educationusa.info	No
Hotcoursesabroad.com	No
USAstudyguide.com	No
Thinkeducationusa.com	Yes

The university's marketing and communications team should consider visiting these sites to make sure the information is up to date and consistent. In some cases admission requirements and tuition prices were outdated, for example.

Highlighted Recommendations

Strategic Direction:

The university should engage in a campus-wide conversation to create a meaningful strategic philosophy on international activity and internationalization. This conversation would begin to counter balance the disproportionate amount of organized international activity at other UC schools in comparison to UC, Santa Cruz.

The university should consider a senior administrator to be the Chief International Officer and oversee the coordination of international activity at UC Santa Cruz. This administrator should report to the Provost to come in line with other UC campuses.

Location:

The university should provide free airport pickups to all new students (undergraduate, graduate and visitors) during the fall quarter of their first year. IEO should charge a fee for subsequent pick-ups.

Academic Programs:

Mail Advising Period One information to international students and their parents.

Prioritize international degree-seeking students over international exchange students when it comes to course registration.

Establish relationships with academic program officers from sponsored-student programs to see which university degree programs are on approved lists.

Enrollment Management:

The university should synergize the international recruitment efforts of both undergraduate and graduate admissions.

Promote extended deadline for applying to UCSC to March 1, if possible.

Educate the international students with I-20s pre-July 15 on what the provisional acceptance and the conditions of admission mean for them and provide them with a letter of support to take to the embassy.

Personalize international admissions on the web site and in external communications and remove generic email listings.

Examine the reasons for the low acceptance rates among international graduate applicants.

Translate key website information into languages reflective of the top recruitment markets.

Create and implement a yield strategy aimed directly at accepted international students to increase the SIR rate.

The university should communicate international admissions decisions to international students using a service with a tracking system.

International Infrastructure:

The university should expand the IEO to include departmental directors in the following areas: International Student Services (ISS), Internationalization, Programs Abroad, Strategic Partnerships, and Immigration Services.

The Office of Strategic Partnerships would have the greatest impact on the ability to increase international enrollments and revenue from international activity and therefore should be given priority.

The IEO should establish itself as the central resource for all incoming international students and scholars.

The university should allow for user fees to be charged to international students for certain services.

Student Life:

The university should leverage the success of programming for international students at College Nine and the IEO and expand this to the entire international student and scholar population.

New student orientation sessions should include incoming undergraduate and graduate degree-seeking students, incoming EAP students, and incoming visiting scholars.

Housing:

The university should discourage an imbalance in housing where by too many students from one country live in one of the colleges.

Cost:

The university should at least maintain the undergraduate award of \$20,000 to remain competitive among the UC cohort and to reduce the gap in cost with other competitor set universities with similar international student profiles.

Final Summary

The University of California, Santa Cruz is capable of recruiting and enrolling a significant number of international students. Recent history has demonstrated this ability at both the undergraduate and graduate levels. A review of variables finds some needed improvements but nothing that raises a red flag.

There is tremendous pressure to succeed because of incentives within the University of California system and because of the international student enrollments at in-state competitors.

The biggest obstacle to a university starting a new initiative is often lack of familiarity. In this sector, students cannot apply to that which they don't know exists. We face competition that has been telling their story for decades, and has multiple stories to tell.

In California, our in-state rivals drown our international story out. Six UC schools were recently ranked among the Top 100 universities in the world by rankings in reputable publications in the UK. Admissions offices and other entities involved in international education to include centralized international education offices, extension offices and thematic centers, have developed and enhanced their reputations over time.

The undergraduate admissions office at USCS is the primary storyteller. The university's best chance at success is to synergize the efforts of offices across campus and organize a collective international outreach.

The key stakeholder groups in this effort will be undergraduate and graduate admissions, the Committee on Admissions and Financial Aid, Undergraduate Education, Enrollment Management, the Financial Aid and Scholarship Office, Orientation, the Committee on International Education, Faculty Senate, and the International Education Office.

A collective approach with an expected return requires leadership. The university should move to identify an international leader and an office that can begin to coordinate/support international outreach in order to leverage the intellectual capital of faculty, staff, administrators, and alumni. Strong leadership to create more international story lines to promote will help increase the international profile of the university and shift the conversation from "Who are you?" to "I want to join you". These initial steps will help the university begin to compete with the collective action of UC institutions as it relates to international education.

The return on the investment in international recruitment efforts should not be measured entirely by enrollments. The university should measure success in enrollments, grants, short-term programming, international internships, gifts from

alumni and international recognition. International recruitment efforts can spark this return and a road map on how to do that will make up the main part of the next report.