

# *Third Party Inquiries: Performance Review of Cappex and Hobson 2016 - 2020*

*2020-03-20*

## **Description**

IN ANTICIPATION OF an evaluation of third party inquiry vendors, I was asked to provide a summary of Cappex and Hobson's performance over the past three years.

Cappex and Hobson contract details are as follows:

- Cappex - annual contract, November - October, 16,500 USD
- Hobson - 33,560 USD
  - Intersect Awareness: annual contract, for the enhanced college profile and counselor community (October - September)
  - Intersect Connection-Active match competitive and Active match self matching: 6 mos (August - January)
  - Major's Awareness: 6 mos (August - January)

## Findings

### *Total Inquiries by Anticipated Start Year*

According to Aaron Deets, our CAPPEX representative, given the unpredictable class distribution of inquiries, considering the funnel by anticipated start year is a good way to evaluate whether we see a return on investment. Although numbers are final up until the anticipated term FA19, it is important to note that confirmations and enrollments will surely increase for FA20, as will all stages for FA21 and and FA22. FA20 Cappex enrollments are likely to exceed those of FA19.

Table 1:

Initial.Referral.Source	Inquired	Applied	Admitted	Confirmed	Enrolled
<b>Anticipated Start 2017</b>					
CPPX	230	17	14	7	6
HBSN	403	69	52	8	7
<b>Anticipated Start 2018</b>					
CPPX	807	118	111	41	36
HBSN	515	238	205	61	52
<b>Anticipated Start 2019</b>					
CPPX	824	114	101	34	29
HBSN	672	297	252	85	68
<b>Anticipated Start 2020</b>					
CPPX	1386	337	311	41	20
HBSN	596	241	213	19	1
<b>Anticipated Start 2021</b>					
CPPX	367	1	1	0	0
HBSN	95	0	0	0	0
<b>Anticipated Start 2022</b>					
CPPX	84	0	0	0	0
HBSN	4	0	0	0	0

*Cappex Inquiries by Contract Period*

The following table shows the distribution of the of the Cappex inquiries for each contract year. The numbers are weighted heavily towards upper class students.

Table 2:

	Anticipated.Start	Inquired	Applied	Admitted	Confirmed	Enrolled
<b>Contract CPPX 2016 - 2017</b>						
1	Fall 2017	225	17	14	7	6
2	Fall 2018	576	106	101	37	34
3	Fall 2019	326	52	46	16	13
4	Fall 2020	51	31	27	9	7
5	Fall 2021	3	1	1	0	0
<b>Contract CPPX 2017 - 2018</b>						
6	Fall 2017	2	0	0	0	0
7	Fall 2018	223	12	10	4	2
8	Fall 2019	410	57	50	16	15
9	Fall 2020	314	69	58	15	10
10	Fall 2021	22	0	0	0	0
<b>Contract CPPX 2018 - 2019</b>						
13	Fall 2019	88	5	5	2	1
14	Fall 2020	916	218	209	17	3
15	Fall 2021	256	0	0	0	0
16	Fall 2022	46	0	0	0	0
<b>Contract CPPX 2019 - 2020</b>						
18	Fall 2020	105	19	17	0	0
19	Fall 2021	86	0	0	0	0
20	Fall 2022	38	0	0	0	0

*Hobson Inquiries by Contract Period*

The following table shows the distribution of the of the Hobson inquiries for each contract year. The numbers are weighted heavily towards upper class students, as for Cappex, however, the Junior:Senior ratio has been more variable over the past 4 years.

Table 3:

	Anticipated.Start	Inquired	Applied	Admitted	Confirmed	Enrolled
<b>Contract HBSN 2016 - 2017</b>						
1	Fall 2017	403	69	52	8	7
2	Fall 2018	287	126	112	38	31
3	Fall 2019	19	11	9	5	3
4	Fall 2020	6	4	1	0	0
<b>Contract HBSN 2017 - 2018</b>						
5	Fall 2018	228	112	93	23	21
6	Fall 2019	381	202	177	59	50
7	Fall 2020	18	15	12	7	1
<b>Contract HBSN 2018 - 2019</b>						
9	Fall 2019	272	84	66	21	15
10	Fall 2020	129	51	50	7	0
11	Fall 2021	6	0	0	0	0
<b>Contract HBSN 2019 - 2020</b>						
12	Fall 2020	443	171	150	5	0
13	Fall 2021	88	0	0	0	0
14	Fall 2022	4	0	0	0	0

*Total Inquiries and Enrollments by State 2016-2020*

The next five tables explore third party vendor performance at the state level in order to determine if one vendor out-performs the other in out-of-state enrollments.

Table 4:

Region	Initial.Referral.Source	Inquired	Enrolled
<b>Maine</b>			
Maine	CPPX	981	71
Maine	HBSN	744	111
<b>New Hampshire</b>			
New Hampshire	CPPX	290	8
New Hampshire	HBSN	215	2
<b>Massachusetts</b>			
Massachusetts	CPPX	500	3
Massachusetts	HBSN	601	4
<b>Connecticut</b>			
Connecticut	CPPX	314	2
Connecticut	HBSN	194	4
<b>Vermont</b>			
Vermont	CPPX	82	4
Vermont	HBSN	98	4
<b>Rhode Island</b>			
Rhode Island	CPPX	96	0
Rhode Island	HBSN	1	0
<b>Other</b>			
Other	CPPX	1446	3
Other	HBSN	432	3

*Fall 2017: Total Inquiries and Enrollments by State*

Table 5:

Region	Initial.Referral.Source	Inquired	Enrolled
<b>Maine</b>			
Maine	CPPX	26	2
Maine	HBSN	21	5
<b>New Hampshire</b>			
New Hampshire	CPPX	7	1
New Hampshire	HBSN	17	0
<b>Massachusetts</b>			
Massachusetts	CPPX	26	2
Massachusetts	HBSN	111	0
<b>Connecticut</b>			
Connecticut	CPPX	11	0
Connecticut	HBSN	23	1
<b>Vermont</b>			
Vermont	CPPX	7	1
Vermont	HBSN	9	1
<b>Rhode Island</b>			
Rhode Island	CPPX	3	0
<b>Other</b>			
Other	CPPX	150	0
Other	HBSN	222	0

*Fall 2018: Total Inquiries and Enrollments by State*

Table 6:

Region	Initial.Referral.Source	Inquired	Enrolled
<b>Maine</b>			
Maine	CPPX	198	28
Maine	HBSN	224	47
<b>New Hampshire</b>			
New Hampshire	CPPX	86	4
New Hampshire	HBSN	58	0
<b>Massachusetts</b>			
Massachusetts	CPPX	134	0
Massachusetts	HBSN	134	1
<b>Connecticut</b>			
Connecticut	CPPX	78	1
Connecticut	HBSN	35	0
<b>Vermont</b>			
Vermont	CPPX	23	3
Vermont	HBSN	22	1
<b>Rhode Island</b>			
Rhode Island	CPPX	22	0
Rhode Island	HBSN	1	0
<b>Other</b>			
Other	CPPX	266	0
Other	HBSN	41	3

*Fall 2019: Total Inquiries and Enrollments by State*

Table 7:

Region	Initial.Referral.Source	Inquired	Enrolled
<b>Maine</b>			
Maine	CPPX	200	25
Maine	HBSN	265	58
<b>New Hampshire</b>			
New Hampshire	CPPX	71	3
New Hampshire	HBSN	72	2
<b>Massachusetts</b>			
Massachusetts	CPPX	135	0
Massachusetts	HBSN	180	3
<b>Connecticut</b>			
Connecticut	CPPX	104	0
Connecticut	HBSN	73	3
<b>Vermont</b>			
Vermont	CPPX	21	0
Vermont	HBSN	27	2
<b>Rhode Island</b>			
Rhode Island	CPPX	28	0
<b>Other</b>			
Other	CPPX	265	1
Other	HBSN	55	0



*Fall 2020: Total Inquiries and Enrollments by State*

Table 8:

Region	Initial.Referral.Source	Inquired	Applied	Admitted	Enrolled
<b>Maine</b>					
Maine	CPPX	464	234	215	16
Maine	HBSN	222	149	135	1
<b>New Hampshire</b>					
New Hampshire	CPPX	89	20	19	0
New Hampshire	HBSN	53	18	17	0
<b>Massachusetts</b>					
Massachusetts	CPPX	149	28	26	1
Massachusetts	HBSN	144	33	26	0
<b>Connecticut</b>					
Connecticut	CPPX	88	9	9	1
Connecticut	HBSN	51	21	18	0
<b>Vermont</b>					
Vermont	CPPX	21	6	6	0
Vermont	HBSN	36	13	12	0
<b>Rhode Island</b>					
Rhode Island	CPPX	32	7	7	0
<b>Other</b>					
Other	CPPX	543	33	29	2
Other	HBSN	90	7	5	0

**Conclusions**

- Since 2016, Hobsons has consistently sent ~ 1,200 inquiry names per contract period. Cappex provides more inquiry names, ~ 10% more. Overall, ~ 50% of the the names are new to the University of Southern Maine. Cappex and Hobson have accounted for 3.5% and 2.5% respectively of first-year student inquiries over the past 2 fiscal years.

- The ratio of Maine to out-of-state (New England) inquiries is similarly ~ 30% : ~ 70% for both vendors. Neither has boasted more out-of-state enrollments. Between 80-85% of the enrollments are from in-state.
- The data in Table 1 reveals that Cappex provides more inquiry names than Hobson, yet historically, Hobson inquiries were more likely to enroll. This may change for Fall 2020 enrollment, but it's too soon to know.
- The data in Tables 2 and 3, illustrate the distribution of anticipated start dates for each vendor and contract year. Although the majority of inquiries are Juniors and Seniors, the class mix and distribution varies from year to year.
- Tables 4-5 show inquiry and enrollment data by state. The intent was to explore whether one vendor performed better than the other in terms of enrolling out-of-state students. Both vendors perform equally.
- Year over year, tuition revenue justifies the contract cost.
- In FY20, USM changed its contract with Hobson by adding additional services. It is too early to know whether the increase in Hobson cost has been worth the investment.