College of Charleston Assessment Template *Please copy completed form into Compliance Assist. Thank You.*	**Date form Completed: 10-27-11**

Program Name and Type: **Division of Enrollment Planning (Admissions, Financial Aid, Registrar)**
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Does this program follow specialized accreditation standards (e.g., NCATE, AACSB)? __(Yes) __(No)
Name of the accrediting organization ____
Date of last program review for the accrediting organization ___________________________
Date of next program review for reaccreditation ______________________________________

Program/Department Mission Statement: The Division of Enrollment Planning provides the highest standards of excellence in managing enrollments. The division actively identifies, counsels, recruits and enrolls high caliber students whose experiences and talents demonstrate that they and the College of Charleston will benefit by their enrollment. The Enrollment Planning Division serves in a leadership capacity by offering services that promote student success, retention and graduation rates.

Unit or School Mission: The mission of the Division of Academic Affairs is to provide academic vision and leadership in promoting the College's role as a leading public liberal arts and sciences university. The College values academic excellence, student-centered community and the power of place.
In fulfilling its mission, Academic Affairs will:

- Provide students a highly personalized education based on a liberal arts and sciences core and enhanced by opportunities for experiential learning,
- Develop or enhance nationally recognized undergraduate, graduate and professional programs in areas that take advantage of our history, culture and location in Charleston and contribute to the well-being of the region,
- Provide students the global and interdisciplinary perspectives necessary to address the social, economic, environmental, ethical, scientific and political issues of the 21st century.

Assessment Plan (first two columns)		**Assessment Report (all four columns)**	
Program Goal or Student Learning Outcome *What will students know and be able to do when they complete the program? Attach Curriculum Map.*	**Assessment Method and Performance Expected** *How will the outcome be measured? Who will be assessed, when, and how often? How well should students be able to do on the assessment? Attach Rubric.*	**Assessment Results** *What does the data show?*	**Use of Results** *Who reviewed the findings? What changes were made after reviewing the results?*
1. Revise and re-prioritize strategic plan	Complete reprioritization, including the		

for action items relating to the Enrollment Planning Division and undergraduate enrollment and retention goals	development of measurable outcomes • Collaborate with the Division of the Academic Experience to develop realistic retention goals • All key leading indicators (KPIs) will include measurable outcomes • Revised plan will be submitted to the entire Enrollment Planning Division, senior leadership and other key stakeholders by October 1012.		
2. Refine enrollment forecast model and its potential impact on academic service areas, departmental seat analysis, faculty workload, and instructional cost	Collaborate with the Office of Institutional Research to review current model for statistical accuracy with expected model to include: • Five-year undergraduate enrollment targets aligned with strategic plan by June 2012 • Develop dashboards on parts of model (enrollment goals,		

	departmental seat requirements, faculty workload, housing demands, and instructional cost) by August 2012		
3. Convert the current Constituent Relations Management System (CRM)-*Recruitment Plus* used by the Enrollment Planning Division to a new, more robust solution, with full implementation and go-live date not later than June 1, 2013	• Establish an implementation committee for replacement of *Recruitment Plus* by October 15, 2011 • Full needs assessment of requirements in replacement solution to be completed by November 11, 2011 • Draft RFP with assistance from Procurement Office, to be completed by May 15, 2012 • Select vendor prior to August, 2012 • Work through test and conversation from August, 2012 until May, 2013		

<table>
<tr><td>4. Align staffing needs, including additional personnel, operating budgets, salaries, and professional development opportunities, with strategic planning initiatives</td><td>Needs assessment by all EP Offices completed prior to February 15, 2012
Establish Divisional goals and priorities prior to April 1, 2012
Submit all budget and staff requests prior to May 1, 2012</td><td></td><td></td></tr>
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<tr><td colspan="4">Additional Outcomes or Comments:</td></tr>
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Assessment Results

Goals:

I. In April, 2012 the Board of Trustees approved the revision of the Strategic Plan which included prioritization of action plans linked to the annual budgeting process. This was an important step in shaping the revisions to the Enrollment Planning strategies, including the action plans and tactics. It also set the framework for developing the key performance indicators (KPIs). The Enrollment Planning Division is currently working with the Office of Institutional Research in refining the scope and the data to be tracked for the Division. The following research questions serve as a framework:

Enrollment Planning Research Questions – Implications for development of Benchmarks (KPIs)

Enrollment / Enrollment Forecasting:

1. How can I have the capacity of running my own point-in-time projections for fall and spring semesters based upon current enrollment?
2. What are the implications of changes to the projections model on:
   a. In state vs. out-of state
   b. Student retention
   c. Net tuition revenue
   d. Instructional cost
   e. Classroom needs
   f. Housing needs

Admissions:

3. How can I obtain a point-in-time comparison of freshmen and transfer funnel activity from prospect through enrollment?
   a. By instate vs. out-of-state
   b. Minority status
   c. International status
4. How can I know at any point-in-time how our funnel activity compares to our competitors with whom we overlap with on applications?
5. How much should I expect yield and funnel rates to differ for instate vs. out-of state vs. international freshmen and transfers?

Financial Aid:

6. How do we know if we are making optimal use of our institutional funds to attract and retain the right students?
7. As we increase either UG enrollment or tuition what is the impact on our discount rate?
8. What is the average amount (point-in-time) of financial aid (all sources) UG students received?

9. What is the average amount (point-in-time) of Institutional aid UG students received
10. Same questions as 8 & 9 segmented by: incoming freshmen, minority students, international students, in-state vs. out-of state students.
11. How can I obtain a point-in-time comparison of financial aid retention rates for the following cohorts: all UG students, freshmen recipients, in-state vs. out-of-state, minority students?
12. How can I obtain a point-in-time comparison of financial aid retention rates by aid sources:
    a. Various institutional funds – Presidential, Gateway, Avery, etc.
    b. Various state scholarship programs – Palmetto, Life, etc.
    c. Abatements

Registrar:

13. How can I know at any given point-in-time which classes are operating at maximum room capacity (seats available)? Departmental enrollment cap?
14. How do I know how many transcript requests have been generated point-in-time and which students have requested them?
15. How much revenue has we generated (point-in time) from transcript requests?
16. How can I know which classrooms are available on either the main campus or North campus at any given time?

Use of results:

The results of the collaborative work between the EP and IR Offices will be reviewed by the heads of each Division and will be presented to the appropriate EVP's for input and changes. Assuming no major interruptions in office workloads for either the EP or IR offices, the original target date of October, 2012 for a revised plan is viable.

II. Refining and building out the current enrollment forecast model is a work-in-progress. Collaborative efforts between the EP and the IR Divisions have led to changes in the Banner and Recruitment Plus software systems which allow for improved tracking of students and more accurate reporting.

Below is the five-year UG enrollment targets that have been developed to align with the College's strategic plan for steady-state UG enrollment on the downtown campus with modest growth, largely in part-time enrollment at the North Campus:

College of Charleston 5-Year Enrollment Projections

	Fall 2011 (Official)			Fall 2012			Fall 2013			Fall 2014			Fall 2015		
	UG	GR	Total	UG	GR	Total	*UG	GR	Total	*UG	GR	Total	*UG	GR	Total
Total Headcount	10,461	1,188	11,649	10,400			10,480			10,520			10,520		
Full-Time	9,700 (92.7%)	347 (29.2%)	10,047 (86.2%)	9,6,40 (92.7%			9,640 (92 %)			9,640 (91.6%)			9,640 (91.6%)		
Part-Time	761 (7.3%)	841 (70.8%)	1,602 (13.8%)	760 (7.3%)			840 (8.0%)			880 (8.4%)			880 (8.4%)		
SC Residents	6,659 (63.7%)	1,003 (84.4%)	7,662 (65.8%)	6,599 (63.5%)			6,655 (63.5%)			6,580 (63.5%)			6,580 (63.6%)		
Non-Residents	3,802 (36.2%)	185 (15.6%)	3,987 (34.2%)	3,801 (36.5%)			3,825 (36.5%)			3,840 (36.5%)			3,840 (36.5%)		

*** The undergraduate growth projected for Fall 2013 through 2015 will be largely part-time students who will be exclusively at our North Campus**

Prepared by Office of Enrollment Planning
3/5/2012

Use of results:

The work to date has been an improvement toward reaching the ideal goal of developing dashboards measuring attainment of enrollment targets at any point in time as well as forecasting the impact of these enrollments on faculty workload. The IR Office has purchased and currently implementing QlickView, a software system which provides the architecture for creating these dashboards. Our current strategic decision-making process will be improved with the possibility of forecasting on "what if" scenarios. The initial priority for developing the dashboards was for the IR to work with Deans and Department Chairs. As soon as that work is completed, the IR staff will work with the EP Division. Thus, the timetable for completion of this project has been set back from August, 2012 until January/February, 2013 with a complete revision of the plan to be reviewed by the Enrollment Planning Division senior leadership and other stakeholders by late spring, 2013.

III. The deployment of a new CRM software product to replace *Recruitment Plus* is on-schedule to meet the full implementation and go-live date of June 1, 2013 at this time. Please note the progress to date:

- Establish an implementation committee for replacement of *Recruitment Plus* by October 15, 2011 - completed
- Full needs assessment of requirements in replacement solution to be completed by November 11, 2011 - completed
- Draft RFP with assistance from Procurement Office, to be completed by May 15, 2012 - completed
- Select vendor prior to August, 2012 - completed, awaiting approval from SC State Procurement
- Work through test and conversation from August, 2012 until May, 2013 – to be determined with vendor

<u>Use of results</u>:

In order to proactively recruit and manage the enrollment of desired students to College of Charleston, we require software tools that enable us to manage: Prospect identification, Volunteer Management, Recruitment Travel Management, Recruitment Event Management, Reporting of data to manage and evaluate activities, and a reliable communication management for all student types through all cycles of admission. This is essential to meet our admissions goals, manage our resources efficiently, and remain competitive position among our peer and cross-match institutions. Without a comprehensive, robust CRM system we lose seven years of processes that have been developed and advanced to create a highly integrated recruitment data base. In addition, we could potentially lose historical data that has been collected and stored in RP.

Other stakeholders beyond Undergraduate Admissions include: Honors College, North Campus; Jewish Studies, Hospitality and Tourism, other academic departments that wish to assist in recruitment and Alumni and Volunteer networks. Moreover, the sharing of admissions information with Development office, Athletics, President's Office would be negatively impacted without ease of access to admissions information and ability to track and flag specific interest groups. Promotion of scholarships to special target groups – minority students, Computer Science majors, Business majors for example, are currently heavily dependent upon R*ecruitment Plus* or any new CRM solution.

Mandatory functionality of the new CRM system includes:

- Have a ready interface with Banner for migration of data
- Provide integration of EPS data and purchased prospective student information from multiple vendors
- User ease in reporting a vast array of data, including longitudinal information
- Ability to record activities, track and assess sophisticated programs for: travel management, tele-counseling, event planning, volunteer management efforts
- Easy query building capabilities
- Ease of data input and retrieval, including an analytics package for assessment

- Ability to research geomarket demographics at all levels from prospect through enrollment
- Provide for a regulated and short notice on-demand communication via multiple modalities to targeted students, volunteers, college counselors, and other constituencies.
- Allow for ease of data clean-up and security of student information
- Must be able to access remotely.
- Be fiscally affordable to the institution

IV. During fall 2011 semester the directors within the Enrollment Planning Division conducted a needs assessment of their functional units. The primary focus was on aligning of staffing needs, personnel and operating budgets to their unit's strategic initiatives and to make sure the initiatives were aligned with the College's Strategic Plan.

In February, 2012 the Registrar staff organization was reorganized to better address customer service, transfer transcript evaluations, report generation, and the transfer of the verifying legal presence process from the Office of Institutional Effectiveness to the RO. Since then, the Registrar Office has been hampered by staff turnover of experienced personnel and lack of additional operating funds to support new initiatives. These issues are currently being addressed by the leadership within Academic Affairs and will likely take most of the 2012-13 budget year to correct.

The Financial Aid Office was identified as the most at-risk unit largely because of its lack of personnel. Based upon most recent NASFAA data on staffing Model analysis comparing College of Charleston to institutions with similar volume indicates a low, average, and high staff size. The Model provides the following FTE data: Low: 16.5, Average: 22.1, High: 26.7. Our Office of Financial Aid has an FTE of **13,** significantly below our competitors and disadvantaging our Financial Aid Office to manage risk. As an initial step to correcting this issue, the Office was provided lines and funding to hire an office manager as well as a Financial Aid Counselor to be shared with the North Campus. On-going efforts will be made to reorganize the Office of Financial Aid over the current budget year.

The Office of Admissions has also sustained turnover of staff (mostly for better salaries and promotional opportunities) during this same period. While initial assessment in fall, 2011 indicated position strength, these turnovers have prompted a revised assessment of staffing and salaries and staff organization.

<u>Use of results</u>:

It is essential that the Enrollment Planning Offices remain competitive with best practices and with its institutional competitors, especially if we are to continue to expand our national reputation. The rapid advances in technology alone have had major implications for current operations and business practices as well as our better delivery of services to students and other constituents. In order to sustain efforts and remain in a proactive mode, this process had reinforced our need for assessment to be an on-going process.