



Pennsylvania's State System for Higher Education Charge for Enrollment Management Working Group

November 12, 2020

Overview

The framework for the Working Groups (WG) includes:

- [Integrations Overall Charter](#) – Provides the purpose and organizational structure for the overall Integrations initiative, including Integration Guidelines with Guiding Principles.
- [Working Group Charter](#) – Defines the roles and responsibilities of the Working Groups and articulates the purpose, goals, principles, scope, roles, and deliverables with which the WGs are charged.
- Working Group Charge (this document) – Includes specific milestones, questions, and goals to be addressed by each WG specifically.

WG Deliverables and Timing

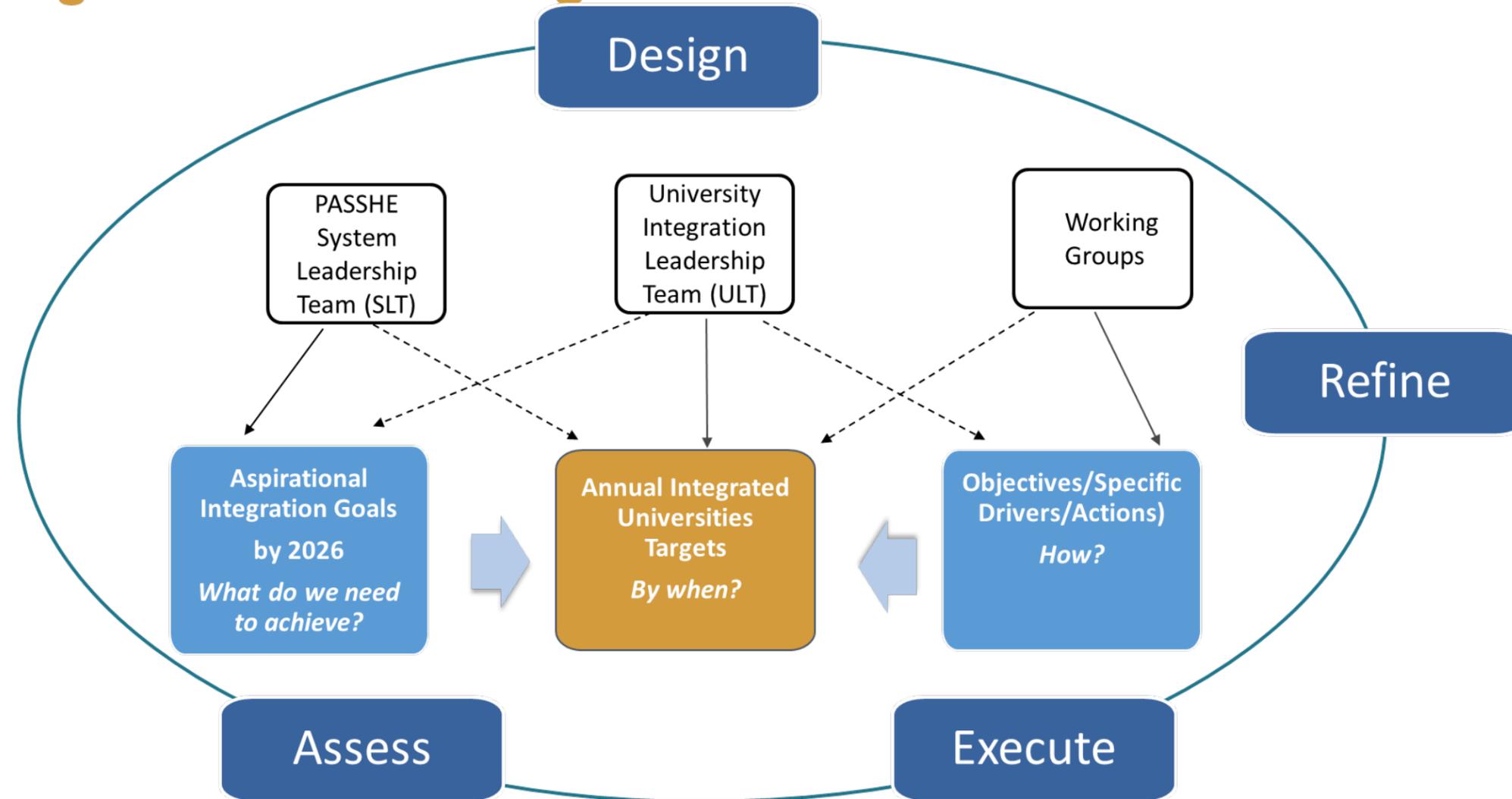
Timing	Deliverable	Details
11/18/20	Consultation Plan – Determine who to consult with, how, and how WG consultation aligns with initiative-level consultation	See <i>Consultation Plan template</i> provided on SharePoint.
12/4/20	Critical Path August 2022 – Confirm the critical path milestones and define the critical path steps and timing to meet critical path milestones for Fall 2022 (what must be done by August 2022 for successful launch and how long will it take)	See <i>Critical Path Milestones</i> and <i>Critical Path Steps template</i> provided on SharePoint.
12/11/20	Aspirational Goals and Annual Targets – Aspirational goals to accomplish by 2026, and define annual integrated institution targets to evaluate progress	See below and <i>Goals/Targets template</i> provided on SharePoint.
1/8/21	Priority 1 Questions (First Draft) – Use above to filter, prioritize, and develop draft recommendations for Priority 1 questions (i.e., key questions to define the future state) and accompanying organizational charts and impact analysis	See below, <i>Priority 1 Recommendations template</i> , and <i>Organizational Chart template</i> provided on SharePoint.
1/15/21	Priority 2 Considerations for 2022-2026 – Outline considerations for what can be done after August 2022 and how it can be sequenced (i.e., known prerequisites)	See below and <i>Priority 2 Considerations template</i> provided on SharePoint.
2/12/21	Priority 1 Questions (Second Draft) -- Update recommendations, incorporating feedback from Systems Leadership Team (SLT) on First Draft	See above.
3/12/21	Priority 1 Questions (Final Draft) – Update recommendations, incorporating feedback from SLT on Second Draft	See above.



Goal Setting

Related to the aspirational goals provided in the Integrations Initiative Charter, define annual integrated institution targets against which to evaluate progress.

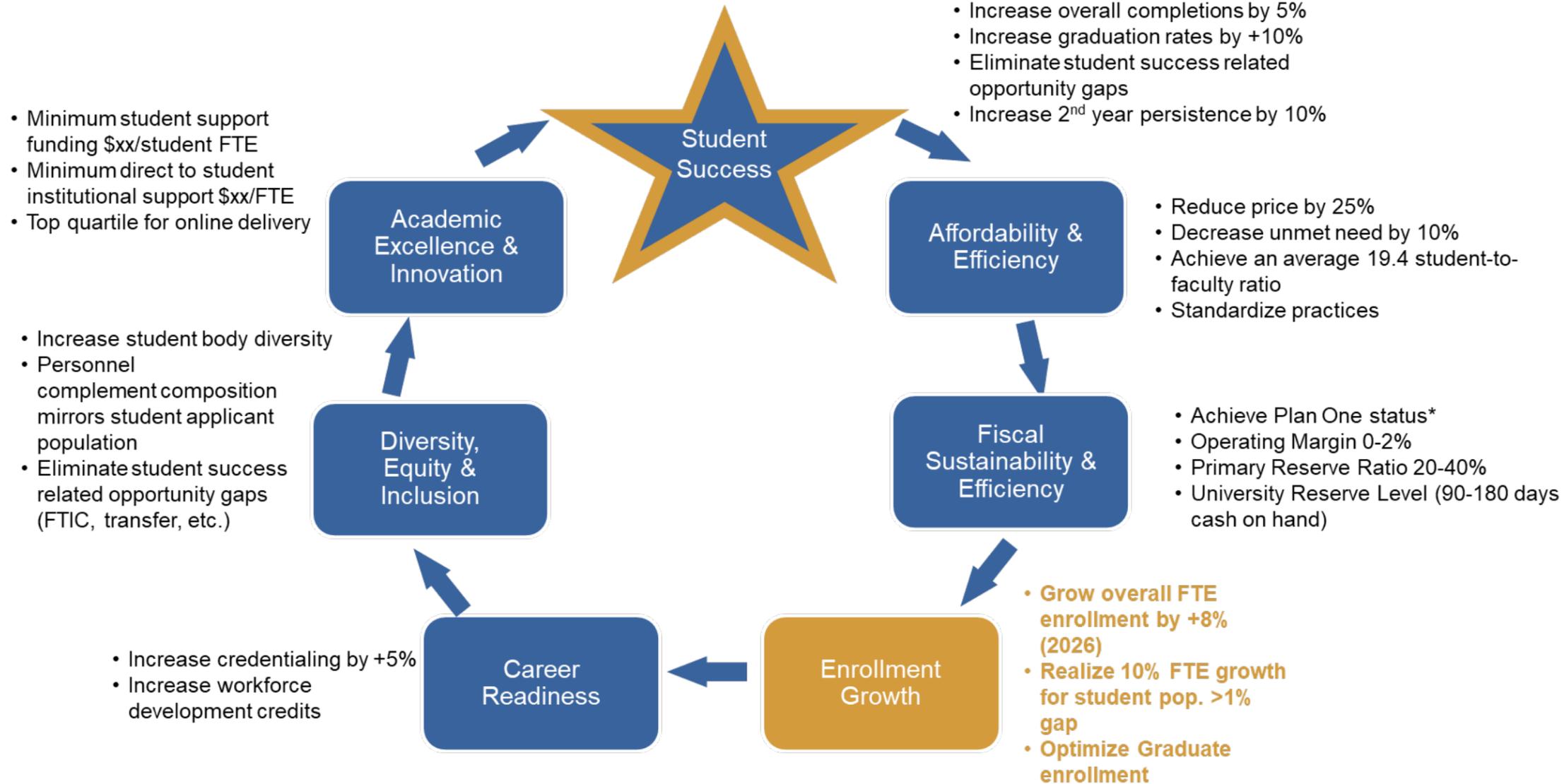
Integration Goal Setting Process





The overall integrations-level aspirational goals are included below and within the Integrations Initiative Charter. Address the highlighted goal(s) applicable to your WG.

Goals Relevant to Enrollment Management Working Group





Integration Overarching Considerations

- What is the current resource inventory for the area (people, facilities, technology, policies)?
- What elements can be integrated into a singular structure for performing the necessary functions (and, as an exception, which require joint and concurrent delivery models)?
- What data do we have regarding existing functions in this area? What data will inform decisions?
- What are the qualitative considerations related to integrating this function?
- Have we kept the guiding principles, goals, and objectives in mind in our efforts?
- What input from other working groups is critical to forming alternatives and recommendations?

For Each Recommendation, Assess the Impacts

- People – Student, faculty, staff, governance (e.g., trustees, organizations) – individuals impacted by the change and any know required activities to support the change (classification, side letter changes, training etc.)
- Process – Policy, procedures, contracts, partnerships, etc., that support the current state which would have to be changed to support the recommendation
- Technology – Systems, support, applications that support the recommended changes and if any updates would be required
- Finance – Required funding to implement or lead to a cost savings
- Physical Assets – Physical assets (buildings) that would be impacted by recommendations
- Compliance and Legal – Federal, state, and local laws, regulations, and other requirements that would need to be changed to implement the recommendation
- Community – Known community stakeholders impacted by the recommendation
- Benefits – Anticipated benefits associated with the recommendation – linked to goals and objectives, if possible
- Risk – Known risks associated with implementation of the recommendation

Use the considerations and questions below to discuss, prioritize, and develop draft recommendations for Priority 1 questions to define the future state and impact analysis.

	High-Level Areas of Consideration	Questions to Inform Recommendations
Enrollment Management Working Group	<ul style="list-style-type: none"> • Organizational Structure • Admissions (processing, standards, etc.) • Student recruitment • Recruitment travel and prospecting • Marketing and branding <ul style="list-style-type: none"> ◦ Communication Plans by student type, stage and campus • Application Processing and Admission Requirements by student type, campus and program • Student records (e.g., grades, transcripts) (Academic affairs topic) 	<p>Priority 1 Questions – Critical Path (What design assumptions must be determined for the combined function/one University?)</p> <ol style="list-style-type: none"> 1. What functions must be simplified or unified across institutions (e.g., student recruitment and communications, admission, scholarships, transfer evaluations registration, and graduation (e.g., policies, procedures, and deadlines)? <ul style="list-style-type: none"> • Development of a unified enrollment management strategy for three universities integrating as one. • Clarity for how the non-traditional population and workforce development fit into the enrollment management strategy. • Recruitment, marketing and admissions processes will need to convey one university to prospective students beginning in summer of 2021. Decisions on the extent of integration possible by summer 2021 related to the development of one university recruitment infrastructure, including: CRM, website, application for admissions, admissions criterion, deposit, deadlines and communication plan. • Evaluation of the technology changes that will be required to achieve any of the items in the last bullet. • Determination of what policies have to change, align or merge in order to create simplicity for students in navigating one university. • Creation of a plan for unifying a recruitment strategy (college fairs, high school visits, recruiting events, etc.) • Creation of a unified strategy using vendors (RNL, EAB, NRCCUA, College Board, ACT) for recruitment, marketing, financial aid leveraging and pricing. 2. What organizational structure is required to cost effectively support overall administration and direct student interaction? <ul style="list-style-type: none"> • Determine what the organizational chart is for a one university model, compared to the current structure for each university. • Determine what structure allows for normal functioning of each campus (e.g., visits for prospective students) versus what can be executed as a shared service. 3. How/When can we begin marketing to students and what is required by the accrediting body (e.g., no sooner than Fall 2021, pending approval)? (Coordinate with Communication/Marketing WG)



	High-Level Areas of Consideration	Questions to Inform Recommendations
	<ul style="list-style-type: none"> Data and Reporting Analysis (Trends and Decision Making for Senior Level Administrators and campus community) Merit and Need Based Aid Strategies (Financial Aid Optimization) Transfer Credit Evaluation and Processes 	<ul style="list-style-type: none"> A determination of what are we selling is foundational to the integration. We must have the academic program array in alignment in order to market each university. Will need the academic program working group to establish the essential framework for what we are marketing. Determination of what pathways can be created to support the program inventory (e.g., credit for prior learning, certificate, associate, bachelor, etc.) Establish a vision for a pricing structure and financial aid leveraging (merit and need) model for the new university. Determine if the strategy is framed as one university or tailored for each individual campus location. Determine how to market three universities until Middle States is finalized. This is critical to recruitment messaging. <p>4. What is required to optimize common course offerings/class schedules?</p> <ul style="list-style-type: none"> A determination of the theoretical framework – and operational impact – of aligning three universities into one related to course offerings, course coding and course scheduling. A common SIS is essential for this goal to be realized. <p>5. What other deadlines and time dependent issues need to be addressed by August 2022?</p> <ul style="list-style-type: none"> Determining what success look like in terms of admissions goals. Determine the baseline for the goal of 8% enrollment growth. Determine if expectations will be for one unified goal and/or three separate campus goals. Determine how long it will take to deploy a unified application for admission and admissions criteria. Determine what can be achieved to launch normal recruiting cycle as one university (hiring and training staff, communication flow, prospect and inquiry outreach, fall travel, etc.). Determine how we leverage opportunities to expand diversity initiatives as a unified system. <p>Priority 2 Considerations – Implementation Considerations and Any Known Prerequisites</p> <ul style="list-style-type: none"> What processes must be standardized, integrated or modified for the integrated functions? <ul style="list-style-type: none"> Need to determine if a standardized admissions criteria and application process are strategic given the demographic differences between the three universities. Determine what models exist to manage a centralized admissions process with three separate campuses and multiple academic programs. We need to determine how we process each population (transfer, freshmen, graduate) as one university – there is an opportunity for improving efficiency with a unified strategy but we have to determine how we get there. What technology and process changes will each university need to make in order to achieve a unified approach? What is required to create a beginning to end standardized recruit to accept process to ensure we are coordinated and responsive from the student perspective? <ul style="list-style-type: none"> Develop a single student journey with key milestones (processes, messaging, touchpoints) for one university by integrating three separate journeys that exist currently. What changes need to be made in admissions criteria, decision matrices and offer processes? <ul style="list-style-type: none"> Determination of whether university or program nuances mandate separate criteria. Assessment of impact on changes to current infrastructure. Determine how accreditation requirements influence a unified admissions process. What will be required to integrate transfer student procedures? <ul style="list-style-type: none"> A consistent approach to transfer credit that all academic departments adopt. What is required to combine grade reporting processes? <ul style="list-style-type: none"> A vision that is accepted by academic departments that is very different from what currently exists. This priority will need to come at the end of the process – a vision for the academic structure and core admissions processes needs to occur first. What variances need to be resolved in policies and protocol (e.g., student records, credit requirements, etc.)? <ul style="list-style-type: none"> What registration variances exist and how do we eliminate them? <ul style="list-style-type: none"> Registration times and dates. Registration procedures. How do we evolve transcript specifications and procedures? <ul style="list-style-type: none"> Determine current procedures and assess the work necessary to align into one. What is required to ensure student information privacy (e.g., FERPA training, policies)? <ul style="list-style-type: none"> Determine current procedures and assess the work necessary to align into one How do we combine institutional catalogs? <ul style="list-style-type: none"> Assess gap in alignment of policies and procedures and determine scope of work necessary to consolidate them. How do we manage the transition of services to specific student populations (e.g., Veteran/Military services)? What is required to transition programs with community partners (e.g., school district dual admission, community college partnerships)?



	High-Level Areas of Consideration	Questions to Inform Recommendations
		<ul style="list-style-type: none">▪ Assessment of current array for each university and determination of what is logical, and possible, for alignment.▪ Integration of institutionally specific strategies into one unified approach that incorporates all of the current attributes of each individual university.▪ Assessment of current procedures and determination of work to align into one.▪ Determine what opportunities exist for expansion of dual enrollment and other partnerships (community college, etc.) to advance career pathways options for students.