



All Staff Meeting

Friday, October 21, 2016 8:30am – 9:50am, 109 Knox Hall

AGENDA

Welcome (L. Melvin)

Mission

The Office of Enrollment Management's mission is to recruit, enroll, retain and graduate a diverse community of student scholars from the University at Buffalo.

Vision

- Enhance UB's competitive market position and prominence
- Align a wide range of integral activities (enrollment management, retention, marketing, communications, access, and student outcomes)
- Use data to support decisions and directions
- Maximize the university capacity
- Integrate technology for efficiency and improving student experiences
- Infuse a flagship mentality throughout the university
- Develop a continuum of institutional messaging and key communications from Enrollment Management offices

Year in Review (L. Melvin)

Office of Admissions Update (J. Aviles)

- Reorganization - merge of undergraduate admissions, GEMS functions, data analytics, and transfer experience and summer/winter sessions.
- Office of Admissions led by Jose Aviles, AVP & director
- Key pillars of operation:
 - Enrollment Operations –led by Danielle Ianni, Director of Enrollment Operations
 - Undergraduate Enrollment Operations (processing) – hired Jennifer Meyers as associate director and supervisor of this unit
 - Graduate Enrollment Operations – temporarily led by Lisa Coia
 - Data Analytics – unit led by Greg Olsen
 - UG & Graduate Recruitment – led by Danny Barrow, associate director
 - Includes on/off campus programs & alumni volunteer program



- Marketing & Social Media – led by Jessica Clark, associate director
- Transfer Experience & Summer/Winter – led by Kira Love, director
- Systems & Technology – led by Mike Russo, associate director
- Diversity – led by Cleveland James, associate director

Undergraduate Admissions

Key Metrics

- **Application Pool**
 - Largest in UB history
 - Increase in domestic applications +10%
 - Increase in avg. SAT +4 points
- **Admitted Class**
 - Increase in domestic admits +8.6%
 - Increase in avg. SAT +2 points
- **Enrolled Class**
 - Increase in domestic deposits +11.1%
 - Increase in avg. SAT +2 points
- **Yield Rate increase +1%**
- **Melt rate decrease -2%**
- **Key Markets**
 - Long Island +7%
 - West Chester / Rockland +35%
 - 5 Boroughs +3%
- **Increase in Diversity +9.8%**
- **Increase in Females +17%**

Key Strategic Changes

Communication / Marketing

- Created strategic, sequential print and electronic communication campaign for Inquiry and Yield Phase
- Key themes: Academic Excellence, Value Proposition, Location, Outcomes, Campus Life, Explorations / Connections, President's Message
- Over 238 separate email messages were created and 47 different print pieces

Processing

- Implemented a new application processing strategy aligned with overarching goals
- Earliest notification of decisions - 90% of all EA decisions communicated before Christmas
- Averaged 10 days from application submission to application evaluation for students above 1200+



- Created system capacity for a double read process

Recruitment

- Increased Fall travel from 4-6 weeks to 8-10 weeks
- Strategically aligned travel using data from internal sources and EPS score sending reports
- Moved to regional management model
- Hired 4 temps to maximize travel coverage and market penetration

Diversity

- Hired first Latino Recruiter; new multicultural recruiter
- Established contact, meaningful dialogue with key CBO's in NYC and Washington DC
- Created first ever overnight experience for multicultural students - 35 attended; 21 deposited
- Overall success: +13% Apps; +13% Admits; +4.8%Deposits

Large Events

- Fall Open House
 - +10% increase in registrations
 - +11% increase in show rate
- Accepted Students Day
 - +26% increase in registrations
 - +21% increase in show rate
 - +32% increase in overall deposits
- Accepted Student Fridays
 - +22% of admitted class who registered for yield programming
 - Offered 22 Mock Classes
 - Financial Aid offered 1 on 1 advisement
 - Specific ASF event on South Campus
 - 74% of ASF attendees deposited

Off-Campus Programming

- Fall Alumni Interviews - Metro NY - 600 participants; 35 Alumni Interviewers
- Fall On-site Admission Program - Over 300 participants
- Winter EOP On-site Admission Program -Washington Heights, Bronx, Queens
- Spring Admitted Student Receptions - 900 participants

UB APART

- Newly formed - Alumni and Parent Admissions Recruitment Team
- Volunteer group grew from 13 in 2015 to 155 in 2016
- "Coffee with Alum" Initiative
- Met with Key Alumnae in San Diego, Washington DC, NJ and NYC
- Partnered with Office of Alumni Engagement

Office of the Vice Provost



Graduate Enrollment Operations

Stay Longer Campaign

- Refresh of the Stay Longer/Live Larger campaign around North/South campus with larger scale acrylic installations to encourage UB undergrads to stay here for graduate study at UB

Website Relaunch

- March 2016 web team relaunched the grad.buffalo.edu website with a refreshed easy to navigate structure, and 100% mobile friendly, fully integrated with international grad information
- March 2016, launched a new intranet site for faculty and staff, mobile friendly, interchangeable with the home site, added additional content for comprehensive program review, meetings section for Graduate executive and Associate Deans council, and others; faculty/staff log in to this site with their UBIT/Password
- July 2015, launched a more visually appealing, robust and highly interactive graduate programs listing of the 300+ graduate and professional academic programs list. Easier to search, filter and is integrated with the GrAdMIT application system. Real-time connection to the application system and website for updates; more detailed information for the prospective applicants; and is all shared content on the UC CMS

Mike Russo updated and coded a new service to replace key functionality in a slow and unreliable PDF conversation service that was purchased as a 3rd party option for our paperless system in GrAdMIT. This update has dramatically improved performance and stability for document conversation and documents are now generated 30 times faster than in the past.

Summer / Winter Enrollment

- Staffing changes
- Increase of +19.9% registered credit hours for winter 2016 compared to winter 2015
- Decrease of 4.5% registered credit hours for summer 2016 compared to summer 2015
- Tracking students who participate in promotional events for additional marketing and assessment
- Strategic marketing
- Campus Events



Transfer Admissions

- Increase of +5.5% (spring 2016) and enrolled 1711 transfers in Fall 2016 transfer
- Held the 2016 Articulation Conference on March 4
- Diversified digital marketing campaigns in spring 2016
- Pilot Transfer Merit Scholarship for Fall 2016 students
- Collaborate with UB Curriculum Office regarding transfer student requirements / concerns
- Transfer Experience Survey

Data Analytics

- Created modifiable Visual Basic programming to quickly and consistently assign Provost Merit Award lists.
- Reported in white paper format a study of gender disparity among UB students, most notably among incoming freshman classes.
- Created Visual Basic programming and a Microsoft Access application for reformatting SAT table information for use in CRM loads using the new SAT formats, overcoming limitations of Access query table size.
- Slide deck of scholarship data in collaboration with OIA showing 4 year scholarship trends including gender, race/ethnicity and geographical region, both overall and by decanal unit, as well as by percentage of awards in comparison with all first time students.
- Created programming and routines to snapshot scholarship data as of a consistent date at the beginning of each term, maintaining said snapshots on the Data Analytics SQL Server.
- Lost Scholarship Offers, trended data on applicants who did not attend after being offered a Merit Award, with analysis on family contribution, unmet need, Pell eligibility and destination institution.
- Enrollment projection by decanal unit
- Wait list survey data as requested from OIA with numerous demographics and academic standing.
- Created algorithm to determine point in time status for multiple years.
- Developed sequence of helper queries for outside areas to more accurately identify IPEDS race and ethnicity.
- STEM Analysis for NSF proposal requested by the Center for Educational Innovation.
- Preparation of CAS Dean's award eligible students, including examination of declining, and low-yield plans.
- Card reader programming for student functions to track attendees as well as flag multiple attempted entries.
- Sent 2 analysts to in-depth Tableau training.



Office of the Registrar Update (S. Mack on behalf of K. Saunders)

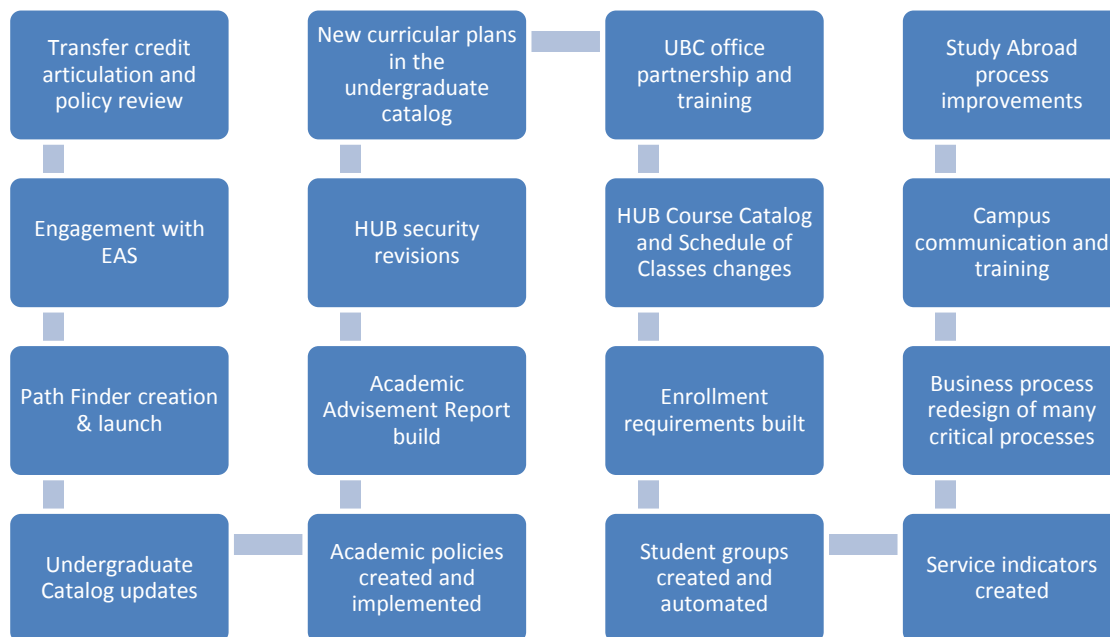
Staff Additions & Promotions

- **Kristen Braunsheidle - Graduate Assistant for Undergraduate Catalog**
- **Shannon Davis - Transcript and Certification Specialist**
- **Lynette DePonceau - Team Lead for Degree Audit & Records Management, now supervising grading**
- **Kim Kent-Chojnicki - Office Assistant 1 – transcripts & customer service**
- **Mike Korona - Assistant Registrar for Student Systems & Reporting**
- **Jamie Monda-Tylec - Scheduling Business Analyst**
- **Joe Rizzo - Assistant Director of HUB & Student Systems Support**
- **Sarah Schneeberger - Graduate Assistant for Scheduling**
- **Renata Towne - Assistant to the Registrar**
- **We will soon be announcing a new Associate Registrar, Assistant Registrar for Scheduling and Enrollment, and Office Assistant 2**

2015-16 by the numbers

- **38,612 transcripts generated**
- **8,693 degrees awarded**
- **5,238 courses seated**
- **4,598 transfer articulation rules updated**
- **4,053 final exams scheduled**
- **2,228 non-degree students activated**
- **2,202 changes to scheduled classes**
- **1,215 exception registrations**
- **101 queries/reports written**
- **52 student records issues addressed in HUB**

Implementation of the UB Curriculum



Accomplishments

- **Classroom space utilization - Improving utilization of our classroom resources through the space utilization study and the proposal of policy and procedure recommendations**
- **Schedule Builder - Supporting registration, time to degree, and the UB Curriculum by providing a tool that enables students to easily craft and evaluate numerous class schedules**
- **Planner & Academic Advisement Reports - Supporting Finish in Four and improving the Academic Advisement Report for accuracy and easier reporting and communications**
- **SIRI Student Dashboards - Improving reporting by simplifying the user experience and bringing more information to the forefront**
- **Early degree audit & diplomas - Making alumni and staff a little happier by optimizing the HUB system and our processes for more timely requirement review, degree conferral, and diploma release.**
- **Improved NCAA certification process - Reducing manual effort by reconfiguring HUB, building custom reports, and simplifying processes to reduce manual effort and get more timely, accurate results**



Goals for 2016-17

Support UB's enrollment and retention goals

- **TAP Degree Applicable Credit at the time of registration:** Collaborate with Financial Aid and Enterprise Application Services to provide TAP eligibility information on degree applicable credits during the enrollment period, thereby retaining more students who may otherwise lose their aid.
- **Undergraduate Catalog:** Continue with project to re-envision the undergraduate catalog for the current enrollment, retention, and graduation climate
- **Classroom Scheduling:** Implement recommendations of the Instructional Facilities Space Utilization Subcommittee, including procurement and implementation of new campus-wide scheduling software

Support improved graduation rates

- **Planner:** Improve Planner functionality and increase utilization of the Planner by improving training materials, providing incentives, and simplifying exceptions processing
- **Schedule Builder:** Assess initial implementation, promote student use, and turn on additional functionality
- **Degree audit in SIRI:** Expand and improve SIRI reports for departmental users in relation to degree audit

Increase visibility and impact in national and regional organizations

- **AAU Registrars:** Serve on the Board of Directors and actively engage in conversations, including leadership of discussions on the evolving role of the registrar
- **AACRAO:** Present at regional and national conferences and seek out opportunities for engagement with committees
- **SUNYRA:** Proactively engage in SUNYRA initiatives and conversations with SUNY, and continue to build on valuable connections made through this organization.

Help UB to become the "premier destination for transfer students"

- **SUNY Transfer Finder:** Implement for prospective transfer students from SUNY schools
- **Articulation Rule Refresh:** Reinstate process to regularly review articulation rules

Support Realizing UB 2020, SVPAA, and University Initiatives

- **UB Curriculum:** Continue implementation efforts, begin assessment and revision of decisions and processes
- **Preferred Name:** Support transgender inclusion initiatives through the implementation of preferred name



- **Finish in Four:** Support the expansion of the Finish in Four program to all students
- **Graduate degree audit:** Expand Academic Advisement Reports to more graduate programs

Operational services: Excellence, optimization, and efficiency

- **Optimization & Efficiency:** Undergraduate catalog; Online transcript ordering; Document imaging; NCAA certification; Academic withdrawal; Applying for graduation; PS queries in graduation processing
- **Excellence:** Great Place to Work initiatives; Assess and improve compliance; Build skillset for supporting data-driven decisions
- **Service provision:** Conduct daily business in a manner that services the university community with excellence in customer service

HUB & Student Systems Support (J. Rizzo on behalf of K. Saunders)

Accomplishments

- People & Space
 - The current HSSS staff represent every functional area, and they bring deep knowledge and experience to the table. We have a strong, experienced Assistant Director coordinating the group.
 - Co-location in Spaulding eases communications and encourages collaboration. We've also established an on-line collaboration and documentation space in Confluence
- Conversations: Locally & Nationally
 - Our streamlining of meetings, including our HSSS meeting that focuses on functional perspectives and needs, has led to truly fruitful discussion and collaborative teamwork.
 - Our structure allows us to share knowledge not only locally, but also via multiple presentations at national conferences and engagement in critical conversations on HEUG.



University at Buffalo

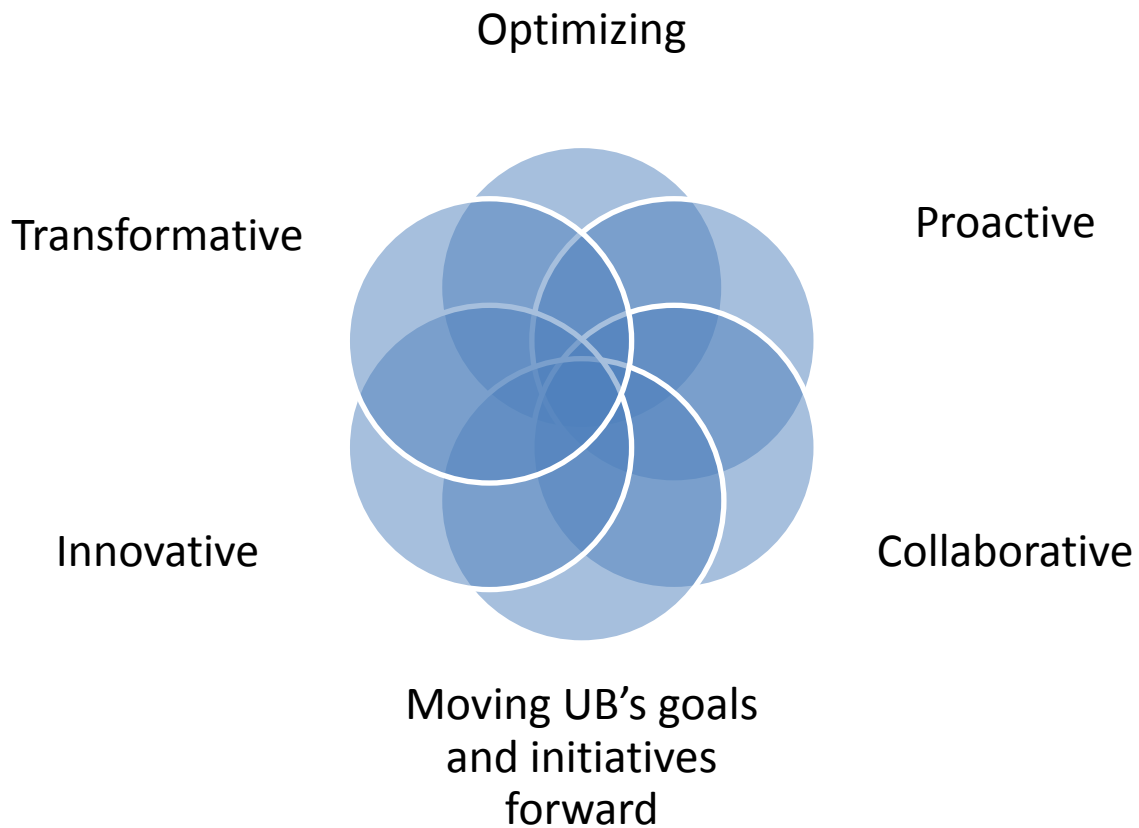
Enrollment Management

Academic Affairs

Mission

Original mission: To transform UB's way of doing business by delivering student-related information in a flexible and user-centric portfolio of applications that integrate admission, academic, bio-demographic, student financial and financial aid information and processes. HUB supports all students, all faculty and numerous staff at the university.

Our mission is evolving. We are now:



Office of the Vice Provost

220 Talbert Hall, Buffalo, NY 14260
716.645.5970

<http://academicaffairs.buffalo.edu/units/enrollment>



System Accomplishments

- **System Availability** - HUB is now available 24 x 7, better serving students, faculty and staff locally and around the world.
- **Significant Fixes and Improvements** - HUB & Student Systems Support worked with EAS and units across campus to fix HUB issues and implement dozens of improvements ranging from color coding of lower environments to Validation Appointments to Excel to CI data population.
- **Communications** - Improved proactive and point in time messaging when the system is down, as well as expanded use of Communication Generation in almost every module area

Goals for 2016-17

- **Promote Clarity**
 - Continue to collaborate with ELT, SVPA, and EAS to clarify the process for proposing & prioritizing & completing HUB improvements
 - Work together to define best practices for common processes, such as Communication Generation, Excel to CI, and system documentation.
- **Promote Collaboration**
 - Proactively engage with HUB, EAS, and UBIT leadership to promote positive working relationships
 - Reestablish a campus-wide advisory committee to ensure all units participate in and inform the evolution of HUB
 - Continue to develop relationships among team members and with colleagues across the country via HEUG
- **Implement & Innovate**
 - Implement Campus Solutions 9.2 and Fluid technology to improve navigation and provide a mobile-friendly version of HUB
 - Work with units on campus to implement solutions they identify, including:
 - Slate CRM
 - Student Success Collaborative & Grades First
 - Class scheduling software



Student Accounts Update (S. Walker)

Top Accomplishments

- Creation of a Financial Responsibility statement for inclusion within the UB Rules and Regulations online affirmation
- BIL Mass Release jobs were setup to run twice daily, to remove account holds for students who had recently been assigned service indicators. Expedites the timely granting of services, such as allowing registration upon satisfaction of bill with the posting of in-person or payments received in the mail.
- Changes made to the eBill (HTML and PDF version) which included detailed information about anticipated aid as well as some “cosmetic” updates.
- Changes made to the eBill notification- now includes name, person number, invoice amount and payment due date.
- ePay link set up for students who no longer have access to HUB, due to security, but still owe a balance.
- Integrated peerTransfer (now Flywire) international wire payments with Nelnet. International students now have the option to make a payment in QuikPAY using Flywire.
- The Summer and Winter financial liability deadlines were changed to match SUNY policy (Summer 2015)
- Implementation of state and federal mandates for granting in state tuition to applicable veterans and dependents
- Automation of Financial Aid disbursement group posting
- Working collaboratively with Financial Aid, successfully implementing a new institutional scholarship processing for state/IFR funded awards. Approximately 600 scholarships this year, \$1.2 million dollars have been processed under the new business process.
- Tax reporting changes for 2016 – resulted in revising the criteria for the Solicitation of Tax ID number Com Gens
- International wire transfer was added as a form of payment within HUB/QuikPay
- Created comm gens to go out to students who are still receiving refund checks to promote and encourage signing up for direct deposit
- Worked with the Student Medical Insurance Office in sending out comm gens to target students with various communications regarding the status of their assessment and/or waiver
- Took advantage of scanning technology to remotely scan checks from student payment and departmental deposit transactions for immediate input into Key Bank account



- Made improvements to the form and process of comprehensive fee waivers (reducing the number of students who need to seek department verification of course location)
- Effective July 1, payment of tuition and fees can now be made utilizing American Express

Goals

- Improvements to the third party billing process (using automation)
- 1098T transition from reporting billed amounts to reporting paid amounts-mandated
- Identifying ways to impact retention; developing a pilot project for payment plan
- Automation of comprehensive fee waivers
- Implementing Online tuition rates by program as approved by SUNY Board of Trustees
- Heart of the Campus – One Stop Shop
- Cash management committee recommendations
- Revenue Distribution committee recommendations
- Financial Aid/Scholarship committee recommendations

New Student Accounts Employees since October 2015

- Stefanie Lizauckas
- Ashlee Rivera
- Brian Magee
- Kristine Kam

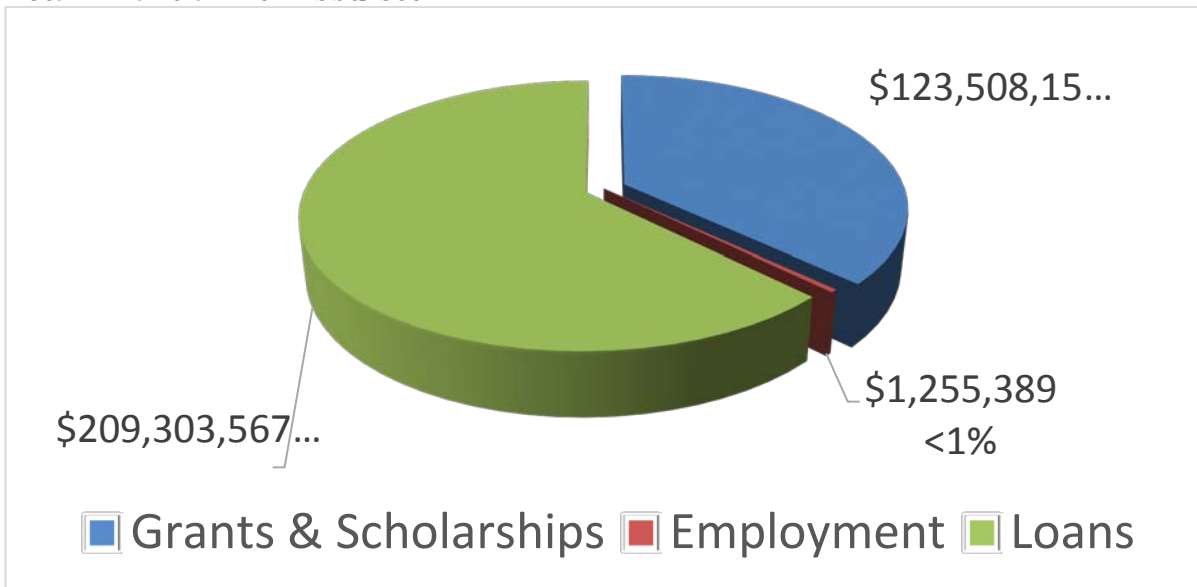


Financial Aid Update (J. Gottardy)

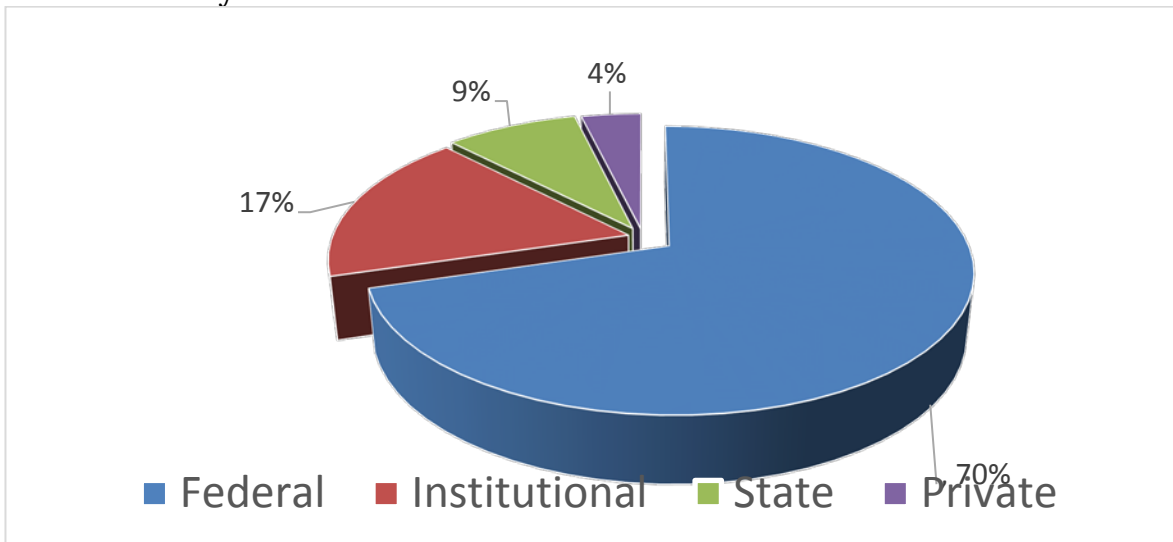
Operations Overview

- Approximately 40,000 financial aid applications received each year
- 64% of enrolled students received some type of financial assistance
- Over \$334 million disbursed during the 2015-2016 academic year

Total Financial Aid Disbursed



Financial Aid by Source





What's New in Financial Aid?

PRIOR-PRIOR YEAR

- Students can complete the FAFSA earlier!
 - FAFSA available for 2017-2018 academic year beginning October 1st opposed to January 1st.
- Tax information from two years prior will be used to complete the FAFSA instead of prior year.
- Offers an extended period prior to May 1 to educate and engage families in critical thinking about costs, aid, and appeals.

Current Initiatives for Financial Aid

OUR FOCUS IS ON

- Strengthening overall operations to enhance yield and retention
 - Increasing compliance and efficiency
 - Increasing employee engagement to drive high performance
- Utilizing campus-wide endowed scholarship funds more strategically
 - Academic Works

Student Response Center Update (L. Melvin on behalf of N. Douglas)

The SRC got off to a great start for the fall 2016 term. Many thanks to my staff, Katie, Lenore, Mel, and Stephanie and to the volunteers that provided assistance for the first couple of weeks.

While our traffic volume is decreasing the importance of the service we provide to students has not. The questions we receive are more focused and detailed and there is clearly a need for the service we provide. Students have become accustomed to getting their business questions answered so they can get on with the business of being a student.

Students will soon be referring to the One Stop Shop (OSS) as the place where they can get answers and business needs taken care of in one place. No need to go all the way to Spaulding to get a parking pass, or the UB Card office to sign up for a meal plan. We are bringing the SRC together with University Life Services (ULC) to form a more comprehensive one stop shop.



Q: What offices are included in the OSS?

- Financial Aid
- Registrar
- Student Accounts
- Academic Advising
- Parking and transportation
- UB Card
- Medical Insurance

Q: What will the office be called?

A: That is currently being finalized.

Q: When will construction begin?

A: It will go to bid by November 1. Approximately 4 weeks later the bid comes back. Construction to begin by January 1.

Q: When will it open?

A: Slated for July 2017

Q: What will it look like?

A: Besides being fantastic, it will mimic the look and feel of the Silverman Library.

I will keep you posted on the progress through the working group we have formed. I would be happy to show you the renderings as we move forward through the process. If your individual offices would like a presentation, I would be happy to accommodate.



Student Success & Retention (L. Melvin on behalf of C. Taplin)

- We have started advising students for next semester registration – we initially started with a registration campaign called, “It’s Registration Time!”
- SSR staff is currently reaching out to those students whom faculty has identified and deemed not doing well in their courses thus far, those courses include the UB Seminar, ULC 148, MTH 121, 131, 141 and CHE 101
- In conjunction with the HUB staff we have begun coding students by cohort with the first fall 2016 class being completed and will go back to fall 2011 for incoming freshman and fall 2013 with transfer students
- Completing help sessions with new students on the pathway tool
- Offering workshops on Academic Planning & Course Registration for new students
- Implementation of GradesFirst has begun

Human Resources Update (L. Melvin)

Looking Ahead (L. Melvin)