

# EXAMPLE

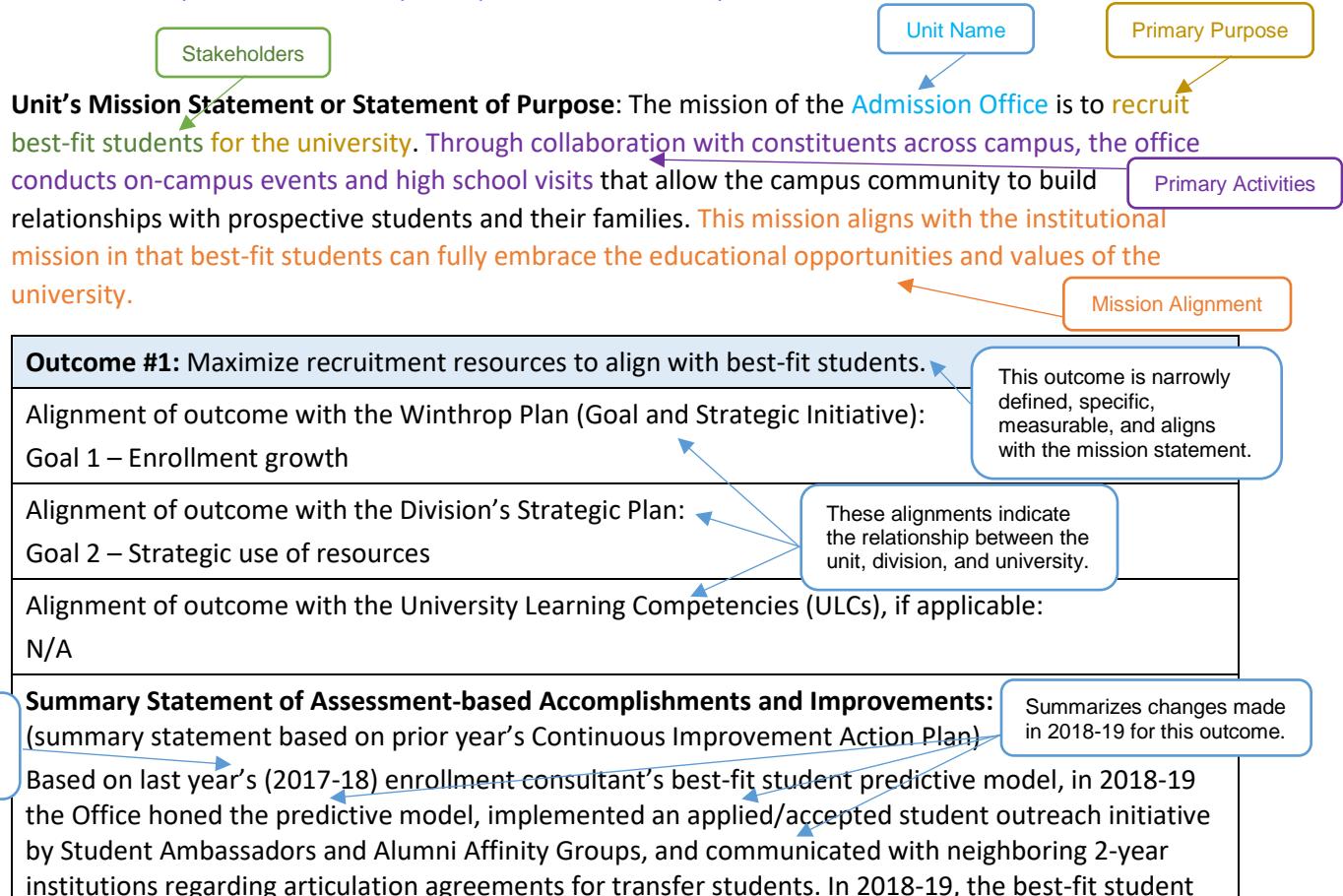
## Winthrop University Administrative Unit Continuous Improvement Report 2018-19

Name of Unit: Admission Office

Contact Person: XX

Date Submitted: 2018-19 academic year

**Winthrop University's Mission Statement:** Winthrop University provides personalized and challenging undergraduate, graduate, and continuing professional education programs of national caliber within a context dedicated to public service to the State of South Carolina...The values of service, excellence, diversity, community, and leadership provide the foundation of Winthrop's continuing development and shape Winthrop's continuing success...Winthrop students acquire and develop knowledge, skills, capabilities, and values that enrich their lives and prepare them to meet the needs and challenges of the contemporary world, including the ability to communicate effectively, appreciate diversity, work collaboratively, synthesize knowledge, solve complex problem, and adapt to change. [Full mission statement: <https://www.winthrop.edu/president/default.aspx?id=1620>]



Summarizes impact of change.

predictive model was further verified, over 3,000 students received a personalized communication from students or alumni, and two articulation agreements were negotiated.

**Activities:**

Provides a detailed account of the activities undertaken in 2018-19 for this outcome. Referencing back to the 2017-18 Report, these activities align with the Action Plan described for 2018-19.

The activities undertaken in 2018-19 are based on the results of our work with the ERA consultants during 2016-17 and 2017-18. The work of the consultants has allowed the institution to identify best-fit students (i.e., predictive modeling), thus the actions conducted in 2018-19 have a renewed focus on the best-fit students. Some of these activities are ones we have been engaging in for several years, but have been reexamined to maximize impact. Specifically, 2018-19 actions addressed (1) work with the consultants, (2) enhanced Student Ambassador outreach, (3) pilot program for alumni outreach, and (4) articulation agreements with surrounding technical/community colleges.

To continue to identify best-fit students, the institution retains its partnership with ERA consulting. The Admission Office uses the information generated by the consultants to direct resources to the appropriate students. This does not mean that we are not working with and responding to all applicants, however, during busy times in the recruitment cycle the office directs human and time resources towards the best-fit students. The Vice President of Enrollment Management and the Director of Admissions meet regularly with the consultants, once every two weeks in non-busy times and weekly during busy times, to receive updates and discuss the current data. Meetings are generally conducted via phone, with an in-person meeting at least twice each semester. Additionally, the consultants meet with the President at least once a year, however, the President joins weekly calls as he deems necessary. (1 – ERA Contract)

Includes reference to documentation.

Student Ambassadors are the student arm of the Admission Office. These students are selected through a highly competitive process and engage in an extensive training program. Our ambassadors conduct campus tours for prospective students and families and respond to student inquiries. In 2018-19, the ambassadors' responsibility expands to include contacting (email/text/phone) students who apply and then following-up further with those who are admitted. Two of the ambassadors, under the guidance of the Coordinator of Admissions, organize this component of student outreach, including a short training session and suggested topics for conversation. A spreadsheet is maintained to identify each ambassador, his/her assigned prospective students, and a log of their activity. Ambassadors receive updated assignments on a bi-weekly basis, reflective of the applicant and admit status of prospective students.

The Admission Office partnered with the Alumni Office to pilot an outreach program between alumni and admitted students. For many years, the two offices have coordinated send-off parties in various cities for new students, hosted by alumni. In 2018-19, we engaged a small group of alumni in a letter-writing campaign to admitted students. Using the two most active Alumni Affinity Groups, fifty alumni volunteers each sent a personal letter to five admitted students. The request is to welcome the student, to explain why the alumni selected the institution, and to describe how their college experience impacted them. If comfortable, the alumni provide their email address and/or phone number, allowing the prospective students to contact them, if desired. This letter writing campaign occurs from early spring through mid-summer, in an attempt to engage students who are still "shopping" during orientations. The Coordinator of Admissions works with the Coordinator of Alumni Affairs to address all the details involved in this pilot project.

Enrollment Management, particularly the Admission Office, has long-standing relationships with several of the surrounding technical/community colleges. In partnership with Academic Affairs, initial conversations were held in 2017-18 to discuss possible articulation agreements. These productive conversations continued into 2018-19, working through many details regarding course equivalencies within both the general education curriculum and introductory courses of the major. The Associate Provost, Assistant Provost, Faculty Senate Chair, and Director of Admissions represent the institution in these conversations. Meetings began in summer 2017 and continued throughout the 2017-18 and 2018-19 academic years. As discussions move towards specific academic content, faculty with appropriate expertise join these meetings, as well as degree audit specialists.

Direct measure of assessment.

#### **Assessment Method #1:**

We measure the effectiveness of the prospective student rating system and recruitment by comparing the prospect rating against actual applicants and the applicant rating against actual deposits. This rating system is a good assessment method for this outcome since it is based on predictive analytics and incorporates prior years' data and results into the protocol.

Clear identification of tool and discussion of how the tool supports the outcome.

The Admission Office has retained an enrollment consultant, ERA, for the past several years. One aspect of the consultant's work has been to assign rating codes for prospects and applicants to aid recruiters with efficiently prioritizing work. The recruiters focus on students based on their prospect rating, with those students receiving a rating of "1," as the best-fit students for the institution. This is a work in progress and has been perfected each year, based on experiences from the prior year.

Data collection process is clearly described.

Reports provided by the consultant are generated bi-weekly during slow times and weekly during busy times. They are shared with the Vice President of Enrollment Management and the Director of Admissions, who discuss these reports regularly with the consultants, once every two weeks in non-busy times and weekly during busy times. Meetings are generally conducted via phone, with an in-person meeting at least twice each semester. These are regularly scheduled meetings, however, many emails and phone calls are exchanged frequently with the consultants. (2 – Sample Consultant Rating Report)

Includes reference to documentation.

Based on the rating system, the Office is able to allocate the time of recruiters, staff members and Student Ambassadors to prioritize their work and maximize their efforts. Rating spreadsheets are shared with recruiters and the Coordinator of Admissions (responsible for the Student Ambassadors' work) at weekly staff meetings. Many of our recruiters are on the road and call into the meetings, receiving their spreadsheet electronically. This information is used to discuss student priority and expectations for the week. (3 – Sample Rating Spreadsheet)

Data are shared and discussed with staff.

As appropriate, biweekly during busy times and monthly during slower times, the aggregated data are shared with all staff and discussed at staff meetings. This is also an agenda item at our annual office retreat, during which we further discuss the data, its impact, and how to improve our efforts for the subsequent recruiting cycle. The consultant is present for this discussion.

#### **Target:**

The targets for converting interest to applications by prospect rating are included in the table below. A prospective rating of "1" represents the best-fit students.

Rating	Percent of Applications	
Prospect Rating 1	15.0%	Clearly states the desired results.
Prospect Rating 2	3.0%	
Prospect Rating 3	2.0%	

The targets for converting applications to deposits by deposit rating are included in the table below. A deposit rating of “1” represents the best-fit students.

Rating	Yield	
Deposit Rating 1	30.0%	Provides sound reasoning for the established target.
Deposit Rating 2	15.0%	
Deposit Rating 3	5.0%	

These targets are set in collaboration with the consultants and are based on last year’s performance and the predictive model being used. Based on this analysis, Prospect Rating 1 and Deposit Rating 1 targets are up 2 percentage points; Prospect Rating 2 and Deposit Rating 2 targets are up 1.5 percentage points; and Prospect Rating 3 and Deposit Rating 3 targets remain at 2017-18 levels.

#### Assessment Results:

The consultant rated 80.3% (86,268 prospects) of the 107,432 senior prospects in the 2018-19 enrollment funnel. (4 – 2018-19 Prospect Rating Dashboard)

The data for converting interest to applications by prospect rating are included in the table below. A prospective rating of “1” represents the best-fit students. The data indicate that 23.9% of prospective students with a Prospect Rating of 1 applied to the institution. 4.6% of prospective students with a Prospect Rating of 2 submitted an application, while 1.8% of prospective students with a Prospect Rating of 3 applied. (5 – 2018-19 Prospect Rating Data)

Rating	Percent of Applications	
Prospect Rating 1	23.9%	Note the use of headers on columns.
Prospect Rating 2	4.6%	The data table provides a clear visual display of results.
Prospect Rating 3	1.8%	A narrative describing the data accompanies the data table.

The data for converting applications to deposits by deposit rating are included in the table below. A deposit rating of “1” represents the best-fit students. The data indicate that 31.1% of admitted students with a Deposit Rating of 1 actually made a deposit to the institution. 17.0% of admitted students with a Deposit Rating of 2 submitted a deposit, while 5.1% of admitted students with a Deposit Rating of 3 deposited. (6 – 2018-19 Deposit Rating Data)

Rating	Yield
Deposit Rating 1	31.1%
Deposit Rating 2	17.0%
Deposit Rating 3	5.1%

Data align with the method. These are actual deposit conversion data.

### Discussion of Assessment Results:

This is the third year that the institution has been working with the consultant and identifying best-fit students. It is the responsibility of the Admission Office staff to prioritize human, time, and financial resources, appropriately, in the recruitment of our first-year class.

Provides data from previous years and a discussion of these data in relation to current year data.

2017-18 comparison data indicate that 15.5% of students with a Prospect Rating of 1 submitted an application, 2% of students with a Prospect Rating of 2 submitted an application, and 1.8% of students with a Prospect Rating of 3 applied to the institution. (7 – 2017-18 Prospect Rating Data) We have exceeded these results in 2018-19, with the exception of Prospect Rating 3 students, matching the 2017-18 percentage. Additionally, in 2018-19, the Prospect Rating 1 target was exceeded by 8.9 percentage points, the Prospect Rating 2 target was exceeded by 1.6 percentage points, and the Prospect Rating 3 target was missed by 0.2 percentage point.

Discussion of target attainment.

2017-18 comparison data indicate that 28.7% of admitted students with a Deposit Rating of 1 submitted a deposit, 14.1% of admitted students with a Deposit Rating of 2 made a deposit, and 4.7% of admitted students with a Deposit Rating of 3 tendered a deposit. (8 – 2017-18 Deposit Rating Data) We have exceeded these results in 2018-19. Additionally, in 2018-19, the Deposit Rating 1 target was exceeded by 1.1 percentage points, the Deposit Rating 2 target was exceeded by 2.0 percentage points, and the Deposit Rating 3 target was exceeded by 0.1 percentage point.

Discussion addresses the data and puts it into context for the office.

The Admission Office and the consultant are very pleased with these results, as we are being guided in our work by the predictive analytics, thus allowing us to deploy our resources appropriately. We have not only met our first-year enrollment target for 2018-19 (430 students) and 2017-18 (410 students), but exceed the 2018-19 target by 9 students and the 2017-18 target by 2 students.

(9 – Enrollment Management Strategic Plan; 10 – Official Enrollment Report 2017-18; 11 – Official Enrollment Report 2018-19)

Includes reference to documentation.

As an additional note, the first-year retention rate from fall 2017 to fall 2018 is up 2 percentage points (class of 2021) over the previous year. The first-year retention rate from fall 2018 to spring 2019 is up 2.5 percentage points (class of 2022) over the previous year. There are many areas engaged in efforts related to first-year students, so this is no easy cause and effect scenario. The Admission Office would like to suggest, however, that our efforts at recruiting best-fit students might play some role in the increased retention rates. (12 – Retention Report: Fall 2017 to Fall 2018; 13 – Retention Report: Fall 2018 to Spring 2019)

### Assessment Method #2:

Multiple methods of assessment are used. Note this second method.

Clear identification of tool and alignment of tool with the outcome.

The Admission Office maintains two spreadsheets that document the outreach to perspective and admitted students by Student Ambassadors and volunteers from two of the most active Alumni Affinity Groups. These spreadsheets are a good assessment for this outcome since they help the office track outreach efforts, thus maximizing the use of our resources. This organized approach to our assessment efforts allows the office to use the time and expertise of our Student Ambassadors and alumni volunteers efficiently.

One spreadsheet identifies each Student Ambassador, their assigned applied or admitted students, and a log of their activity. Ambassadors receive updated assignments on a bi-weekly basis, reflective of the applicant and admit status of prospective students. Their assignment is to contact via email/text/phone each of their assigned students in an effort to add a personal student connection to the admission process. Call nights are held every Tuesday and Thursday evening from 7-10pm in the Admission Office. Student Ambassadors use the office phones and computers to contact their assigned students, updating the spreadsheet as to date/time of contact, brief summary of discussion, and any items that an admission counselor would need to follow-up on. The Coordinator of Admissions works with the ambassadors and the admission counselors, alerting the counselors to flagged items identified during the ambassador's email/text/phone call with prospective/admitted students.

The data collection process is clearly described.

A second spreadsheet identifies fifty alumni volunteers and each of those alumni's five assigned admitted students, including name and address. Each volunteer alumni sends a welcome letter to their assigned students, noting why the alumni selected the institution, and describing how their college experience impacted them. The alumni may include their email address and/or phone number, depending on their level of comfort in doing so, to allow admitted students to contact them with questions or concerns. Alumni notify either the Coordinator of Admissions or the Coordinator of Alumni Affairs as to the date when letters are sent and identify any items that an admission counselor would need to follow-up on with an admitted student. This letter writing campaign occurs from early spring through mid-summer, in an attempt to engage students who are still "shopping" during orientations. The Coordinator of Admissions works with the Coordinator of Alumni Affairs in managing this pilot project. (14 – Sample alumni letter to admitted student)

Includes reference to documentation.

Both spreadsheets are reviewed regularly (i.e., weekly) by the Coordinator of Admissions and the Director of Admissions. As appropriate, information is shared with Student Ambassadors and the Coordinator of Alumni Affairs. The spreadsheets are a regular item on the monthly meeting agenda with the Vice President of Enrollment Management. (15 – Sample meeting agenda with VP)

Data are shared and discussed with staff.

Clearly stated expectation.

**Target:**

At least 50% of students who apply (Prospect Rating 1) and 100% of admitted students are contacted by a Student Ambassador and 50% of selected admitted students are contacted by an alumni. Both of these targets are expected baselines. The Student Ambassador target is based on the Admission Office's expectations and the weekly review of the contacts they have made with students. The alumni target is based on the fact that these individuals are volunteers.

Justification for targets.

**Assessment Results:**

Student Ambassadors contacted 46% of applied students (Prospect Rating 1). Initial contact with applied students was via text (26%), email (11%), and phone calls (9%). Student Ambassadors contacted 100% of admitted students. Initial contact with admitted students was via text (50%), email

(32%), and phone call (18%). (16 – Student Ambassador Log: Contact with Applied and Admitted Students)

Clear and detailed presentation of data.

Includes reference to documentation.

	Applied Students (Prospect Rating 1) (n= 3,246)		Admitted Students (n=1,987)	
	n	%	n	%
Email	371	11%	639	32%
Text	847	26%	1,001	50%
Phone Call	279	9%	347	18%
Total	1,497	46%	1,987	100%

Data align with the method. These are actual student contact data.

Note the use of number and percent.

\*Numbers represent means of initial contact with students.

Narrative explanation of the data that follows in the table.

24 of the 27 (89%) volunteer alumni in Affinity Group #1 collectively sent a letter to 117 (87%) of assigned admitted students. All 23 (100%) of the volunteer alumni in Affinity Group #2 collectively sent a letter to 107 (93%) of assigned admitted students. Overall, 47 of 50 (94%) alumni contacted 224 of 250 (90%) assigned admitted students. (17 – Alumni Log: Contact with Admitted Students)

	Alumni Affinity Group #1 (n=27)		Alumni Affinity Group #2 (n=23)	
	n	%	n	%
Number of alumni engaged	24	89%	23	100%
Number of students contacted	117	87%	107	93%

Note the use of headers on columns.

### Discussion of Assessment Results:

Discussion addresses the data presented above.

#### Student Ambassadors:

Student Ambassadors contacted all admitted students, thus attaining the target. The target (50%) for contacting Prospect Rating 1 students who applied to the institution was not attained, however, this was a baseline target. 46% contacts is acceptable for the first year of implementing this initiative. Texting was the preferred method of communication, and we will explore this mode more extensively in 2019-20. Since this is the first year of implementing this initiative, there is no comparison data to share.

Discussion of target attainment.

We are quite pleased with the results of the Student Ambassadors' work. They are very dedicated students with a strong allegiance to the institution. The initiative in its first year of implementation was successful. The conversations that our Student Ambassadors had with students supports the best practice literature of allowing prospective students to "see" the institution through the eyes of current students. The Student Ambassadors were energized by their engagement with students via this initiative.

Discussion puts the data into context for the office.

We will explore the impact of this initiative next year, as we implement it for a second year.

#### **Alumni Affinity Groups:**

We are pleasantly surprised by the results of the work of our alumni with our admitted students, as these individuals are volunteering their time to support the Admission Office. As previously noted, this initiative is being executed as a pilot program in 2018-19.

The alumni volunteers actively engaged, with 47 of the 50 volunteers following through and writing a welcome letter to each of their five assigned admitted students. In conversations with the Coordinator of Alumni Affairs, these alumni were truly volunteers, responding on their own to the request that was sent to two of the Alumni Affinity Groups. We are noting this as we plan to expand this program. Asking for volunteers is the better approach than forcing individuals to participate.

With such active participation, our target of 50% of the 250 assigned admitted students to be contacted by alumni was surpassed. 224 admitted students (90%) received a welcome letter from an alumnus. Since this is the first year of implementing this initiative, there is no comparison data to share.

Discussion of target attainment.

Discussion puts the data into context for the office.

These results are encouraging as national research indicates that allowing prospective students to engage with current students and alumni help them to make a more informed college selection decision. As of the writing of this report, we cannot report summer melt, however, we will compare the list of students who do not attend in August against our list of those students contacted by alumni.

We will explore the impact of this initiative next year, as we implement it for a second year.

#### **Assessment Method #3:**

Clear identification of tool and alignment of tool with the outcome.

Multiple methods of assessment are used. Note this third method.

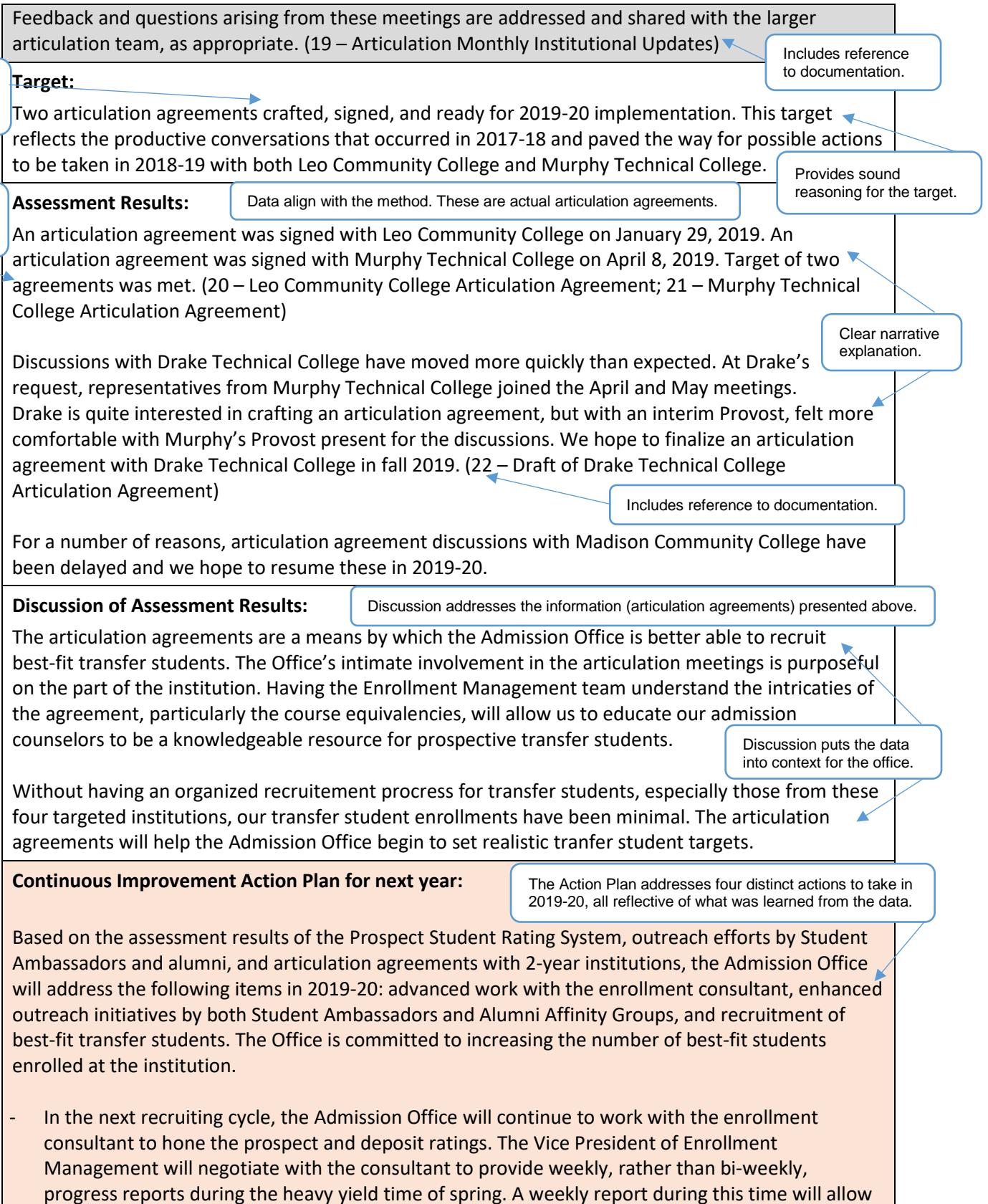
Formal articulation agreements with surrounding technical/community colleges is the assessment method for this outcome. The articulation agreements are a good assessment method for this outcome since they assist in identifying transfer students who are best-fit students for the institution. Successfully completing all course requirements, as outlined within the agreement, allows students to transfer in 60-75 credits and keeps them on-track for an ontime graduation.

Process is clearly explained.

In partnership with Academic Affairs, the Admission Office has explored long-standing relationships with Leo Community College, Madison Community College, Drake Technical College, and Murphy Technical College. Meetings, which began in summer 2017, continued into the 2017-18 and 2018-19 academic years. Productive conversations have focused on identifying general education course equivalencies and introductory major course equivalencies. At various points throughout this work, a number of individuals have come to the table – Provost, Associate Provost, Assistant Provost, Faculty Senate Chair, Vice President of Enrollment Management, Director of Admissions, Director of General Education, and Department Chairs. (18 – 2018-19 Articulation Monthly Meeting Minutes)

Information is shared at a variety of levels.

The institution is keenly aware of the changing student demographic, and the role of the transfer student in both the enrollment and revenue arenas. Consequently, the Provost updates the faculty at monthly Faculty Meetings, while the President updates Senior Leadership on a monthly basis.



for better prioritization of resources toward best-fit students. To enhance the enrollment funnel, the institution will expand to year-round student list purchases in 2019-20. This will require additional negotiations with the consultant for multi-year updates to our upcoming student recruiting pools. As we move towards a systematic approach to transfer student recruitment, we will expand our expectations and engage the consultant in a possible student rating system for transfer students. The Director of Admissions and the Vice President of Enrollment Management will engage the consultant in these conversations during summer 2019, with the expectation that all systems are in-place for the beginning of the 2019-20 academic year.

Note how work with the consultant is expanding to address transfer students. This action is a direct result of the articulation agreements put into place in 2018-19.

- Engaging prospective students with current students (i.e., Student Ambassadors) will continue to be a priority for the Office in 2019-20. Building on the success that we had with the outreach initiative, we will expand the number of call nights to include Sunday, in addition to Tuesday and Thursday. Noting that texting was the most common mode of communication, the number of cell phone available to Student Ambassadors will be increased. A donor has agreed to purchase ten additional cell phones and pay for their data plans, thus increasing available cell phone to 30 for use by the Student Ambassadors. The purchase should be complete by early August and the additional phones will be available when our Student Ambassadors return for the 2019-20 academic year. The Admission Office will continue to strengthen the training of the Student Ambassadors on contacting applicants/admits. We have asked our Campus Visit consultant to enrich this type of training when they are on campus in August and provide examples of good communication strategies.

A clear description of who, what, when, and how.
- Among the best resources for recruitment activities are alumni. The Admission Office, in partnership with the Alumni Office, will increase the number of alumni engaging in the recruitment process during the next admission cycle. Specifically, we would like to double the number of alumni writing a welcome letter to admitted students. It is our hope that we can engage alumni in activities beyond letter writing campaigns and send-off parties, such as attending more recruiting events and identifying prospective students. The Coordinator of Alumni Affairs will work with the Alumni Affinity Groups during summer and fall 2019 to organize an expanded alumni network for letter writing. The Admission Office and Alumni Affairs will add enhancing the alumni contribution to recruitment to the monthly agendas for our fall meetings.

Clear description of process.
- With two articulation agreements in place (i.e., Leo Community College and Murphy Technical College), the transfer student recruitment will be coordinated by a single admission counselor. This counselor will have in-depth knowledge of the transfer agreement, especially course equivalencies for general education and major courses. The admission counselor will hold regular weekly “office hours” on our partner campuses, beginning the first week of the 2019-20 academic year. Working closely with the Degree Audit Specialist in the Registrar Office, it is our hope that transfer students will know the number of transferrable credits and time to degree within a day of meeting with the admission counselor. Additionally, we will develop Major Guides and Pathways for two-year college students, having print copies available and posting them to the Admission and Academic Affairs websites. Working with the Provost Office on the development of these resources, we plan to have them available to transfer students by the end of the fall 2019 semester.

## **Supporting Documentation**

1. ERA Contract
2. Sample Consultant Rating Report
3. Sample Rating Spreadsheet
4. 2018-19 Prospect Rating Dashboard
5. 2018-19 Prospect Rating Data
6. 2018-19 Deposit Rating Data
7. 2017-18 Prospect Rating Data
8. 2017-18 Deposit Rating Data
9. Enrollment Management Strategic Plan
10. Official Enrollment Report 2017-18
11. Official Enrollment Report 2018-19
12. Retention Report: Fall 2017 to Fall 2018
13. Retention Report: Fall 2018 to Spring 2019
14. Sample Alumni Letter to Admitted Student
15. Sample Meeting Agenda with Vice President of Enrollment Management
16. Student Ambassador Log: Contact with Applied and Admitted Students
17. Alumni Log: Contact with Admitted Students
18. 2018-19 Articulation Monthly Meeting Minutes
19. Articulation Monthly Institutional Updates
20. Leo Community College Articulation Agreement
21. Murphy Technical College Articulation Agreement
22. Draft of Drake Technical College Articulation Agreement

Supporting documentation is numbered and listed in the order in which it is presented in the report.