UNIVERSITY OF WASHINGTON TACOMA
Faculty Assembly Executive Council (EC)
Agenda
Thursday, March 29, 2012
Mattress 352
12:30 – 2:00 p.m.

1. Approval of March 7, 2012 meeting minutes.

2. Chancellor's Report

3. Standing Committee Updates (*APC, APT, CC, FA, SBC*).

4. Appointment, Promotion and Tenure Procedures
    ➢ *EC vote on UWT Handbook Appendix A Changes*
    ➢ *Procedures for full Faculty Assembly review and vote*

5. Admissions Improvement Project Update (*Derek Levy*)

6. Other items
    ➢ *Seeking representative for Graduate School Council.*
    ➢ *Seeking representative for Faculty Council on Tri-Campus Policy.*
    ➢ *Upcoming Faculty Assembly Sponsored Events*
    ➢ *Other Announcements.*

Upcoming Executive Council Meetings	Faculty Assembly Meetings 2011-2012
• Wednesday, April 11, 2012 MAT 352	• Friday, May 4, 2012 WPH
• Thursday, April 26, 2012 MAT 352	• Friday, May 11, 2012 Longshoreman's Hall [Tentative/Continuation Meeting]
• Wednesday, May 9, 2012 MAT 352	
• Thursday, May 24, 2012 MAT 352	
• Wednesday, June 6, 2012 MAT 352	
Upcoming Events Faculty Assembly Sponsored Events	
• Faculty Discussion: The Challenge of Teaching Writing (Nicole Blair, Facilitator), 4:00 – 6:00pm, Friday, April 20 FACULTY RESOURCE CTR	
• Faculty Lecture & Discussion: Community Engagement (Marcy Stein), 5:00 – 7:00pm, Thursday, May 10, Tacoma Room	

UNIVERSITY OF WASHINGTON TACOMA
Faculty Assembly Executive Council (EC)
Thursday, March 29, 2012
12:30 – 2:00 p.m.

Attended: Zoe Barsness, Chair, Katie Baird, Vice Chair, Donald Chinn, Marjorie Dobratz, Yonn Dierwechter, Charles Emlet, Diane Kinder, Marcie Lazzari, Nita McKinley, Beverly Naidus, Tracy Thompson, Charles Williams

Excused: Ehsan Feroz, Peter Selkin, Larry Wear, Mark Pendras

Guest: Derek Levy

1. **Approval of minutes from March 7, 2012**
   - Move to approve, seconded, and approved with noted changes.

2. **Chancellor's Report**
   - No report

3. **Standing Committee Updates (APC, APT, CC, FA, SBC)**

   APC (N. McKinley)
   Committee hasn't met since the last EC meeting, but N. McKinley brought up the following for discussion at EC:
   - Committee continuing to receive 1503 requests for signature by N. McKinley from programs without prior review by the full Academic Policy Committee
   - Possible solution that was suggested was to follow procedure set up by Faculty Council on Tri-campus Policy for reviewing Tri-campus proposal approvals. This would necessitate the establishment of a subcommittee of APC. It would then be this subcommittee that was responsible for reviewing and approving any 1503s received between formal APC meetings.
   - Part of the challenge is that program administrators don't understand the need submit to both APC and CC simultaneously; K. Baird to post this requirement on CC website.
   - Having two committees is not efficient, which is why the task force is currently in place to solve these issues.
   - Look for ways to move through the committee process faster.

   CC (K. Baird)
   Committee met and there is nothing to report, but brought up the following for discussion at EC:
   - General discussion among EC members ensued – ideally what is it that faculty should be doing with curriculum, and especially with respect to new course proposals (90% of CC work); might such activities be folded into a new combined committee if that is the recommendation of the task force, or subcommittee of such a combined committee.

- K. Nelson – chair of the subcommittee - will be coming to EC to discuss how to disseminate the information and also the academic council, and by then back to units by way of EC through committee representative. J. Buffington – who is a member of the task force -- can share with other program administrators. Additionally, K. Nelson is going to send an email out to faculty to explain what is taking place.
- The final process is to put out a full report with recommendations by end of the year. It is expected the recommended solution will likely require redrafting of bylaws during the summer, submitting to Seattle, and a full faculty vote. The report is unlikely to be able to go before full faculty by the fall retreat (2012), however, Z. Barsness will check with Seattle to see if it can be informally adopted until the official vote, in order to be implemented by fall.
- This will require an education process for the faculty by the representatives from EC to their units at faculty unit meetings, request feedback
- Suggestion to develop a one page information document to be sent out on faculty line, and then have K. Nelson present at the Faculty Assembly general meeting (May 4, 2102)

FA (D. Chinn)
The committee has not met since March 7, and the following discussion took place in this Executive Council:
- D. Chinn to contact E. Feroz regarding teaching evaluations and a report/study from a conference that E. Feroz attended; suggestions to contact B. Kalikoff, C. Greengrove, D. Drevdal, R. Thompson for input, as well
- Interviews by FA members of active faculty researchers are close to completion and a report will follow.

SBC (M. Lazzari)
- An SBC report will be going out to campus shortly.
- Working on a website for the SBC which should be out within the next three weeks.
- Z. Barsness reported on the issue of required faculty consultation and advice for code compliance – where is this to be given? Is it the SBC or somewhere else? SBC is joint governance committee not purely faculty committee, Z. Barsness indicated that additional conversations were planned to be held with the Chancellor and VCAA on this topic. At Bothell it is the Executive Council of the GFO that provides such budgetary advice and consultation to the UWB Chancellor.

4. **Appointment, Promotion and Tenure Procedures (Y. Dierwechter)**
   The committee hasn't met - the following issues were discussed:
   - The email requesting feedback or changes to the cover letter for the proposed Appendix A changes resulted in minor changes, nothing substantive.
   - In order to educate faculty on the issue prior to the full faculty vote, he proposes a meeting with E. Ignacio and D. Drevdal, who have prior history on the full issue, to assist in developing a PowerPoint for education at unit level,

to facilitate the knowledge that the revisions are to tighten up procedural integrity to protect the candidate.

- There was motion made to adopt the changes to Appendix A as proposed, it was seconded and approved by a unanimous vote of the EC.
- Full faculty vote to be submitted electronically the week after the May 4, FA meeting.

5. Admissions Improvement Project (AIP) Update (Derek Levy)

D. Levy, Associate Vice Chancellor of Enrollment Services, report consisted in part, on why the project originated. It was decided that while enrollment services was meeting enrollment numbers, there was much more that needed to be done.

The goals for the Admissions Improvement Project (AIP):
- Admissions Office must be high functioning
- Develop culture of continuous improvement
- Increase application yield
- Students must get reinforced branding that we are NOT big and impersonal

For how AIP is being implemented, successes to date, and projects in progress, the project and executive summary with recommendations are attached to these meeting notes for review. The AACRAO Consulting report by Michele Sandlin is also attached.

Other items discussed:
Should program make admission decision before enrollment allowed by UW Tacoma enrollment services or admit as – pre-major – pre-program? Noted that faculty are supposed to be involved and how will this mesh with enrollment services new systems?

6. Other items

- There is a need for UWT representation on the Faculty Council on Tri-Campus Policy (FCTCP) during the spring quarter. J. Reusch and K. Baird's teaching schedules conflict with the April 19 and May 24 and meetings. There is a request for EC volunteers to cover these two meetings. For the two at large representatives, there is a need for spring coverage for J. Reusch, and longer term for J. Nicoletta whose teaching schedule conflicts for the rest of 2012 – 2013 on the FCTCP.
- M. Stein's term on Graduate School Council is also ending, and there is a need for new representation. M. Stein has offered to continue in her role, but it was suggested that representation on committees in Seattle are not always staffed by faculty who reside in Seattle
- K. Cargill's representation on Graduate School Council will be ending in spring of 2013
- Nominations and elections for Vice Chair Faculty Assembly needed; Call for nominations will go out before next EC. Nominations to close Monday prior to May 4 Faculty Assembly Meeting. Vote to elect VC will occur during week following May 4 Full FA meeting

- Identification of who is rolling-off standing committees. Concern regarding significant proportion of turnover in current membership of APC anticipated. Suggested that N. McKinley encourage some existing members of APC that would otherwise roll off committee to consider volunteering to serve another term. This would mitigate turnover problem on APC.

Adjourned 2:00 p.m.

Admissions Operations Review

University of Washington Tacoma

Michele Sandlin, AACRAO Senior Consultant

January 9 - 11, 2012

Project Summary

1. University of Washington Tacoma (UW Tacoma) requested an expert review of and recommendations for the following per UW Tacoma request for proposal numbered RFQQ JPS111101:

    – Development of an applicant/student centric admissions model and processes.

    – Improved stakeholder experience and outcomes related to admissions.

    – Improved overall organizational effectiveness and coordination.

    – Streamline processes related to:

      • Eliminating waste.

      • Decreasing errors.

      • Improving timelines.

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Project Summary

2. The goal of the consultation was for the improved model and processes to enhance the timeliness, accuracy and quality control, and customer services in the following areas:
   - File assembly and management.
   - Coordination of admission to majors.
   - Communication with prospective and applicant students.
   - Evaluation and awarding of transfer credit.

Project Summary

3. AACRAO Senior Consultant Michele Sandlin conducted a three day on-site consultation on January 9 - 11, 2012 with the UW Tacoma to review the university's organizational model for Admissions' functions and services. Specific review was made of centralized versus decentralized aspects of admission operations. On the third day of the consulting visit, Ms. Sandlin delivered a summary report of her observations and recommendations to Chancellor Debra Friedman, Vice Chancellor of Academic Affairs JW Harrington, Associate Vice Chancellor for Enrollment Services Derek Levy, and Organizational Effectiveness Program Manager Renee Smith Nyberg.

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Pre-Visit Activities

A conference call was conducted on Wednesday, December 14, 2011 in preparation for the on-site visit. The discussion reviewed the objectives of the project, the timeline, provided an overview of the university and its current challenges, requested discovery materials, and outlined the forthcoming consulting visit to campus.

1. The conference call on December 14, 2011 was conducted with:
   – Renee Smith Nyberg, Organizational Effectiveness Program Manager

2. Discovery materials received:
   – Department vision, mission, and values statements.
   – Enrollment Management, Recruit and Admissions objectives, metrics action plans, and goals.

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Pre-Visit Activities

- Organizational charts and reporting lines.
- Admissions staff position descriptions.
- Data: census day report, daily yield stats, student status stats, mail codes.
- All communication letter templates.
- Admission process, decision criteria; cognitive and non-cognitive, worksheets.
- Decision codes, residency process.
- August 2007 consultant report, stakeholder survey.
- Department SWOT analysis, and program evaluation.
- Website review by Consultant Sandlin.

On-Site Activities: Agenda

1. Individuals, teams met with, and the processes reviewed during the three day on-site consultation:

   - Chancellor, Vice Chancellor of Academic, Associate Vice Chancellor for Enrollment Services, and OE Program Manager

   - Academic Dean and Directors

   - Chancellor's Management Team

   - Admissions Operation Staff

   - Detailed process review of processing and evaluation

   - Assistant Director of Advising and Outreach, Enrollment Services Office Assistant, Recruitment Support Supervisor

   - Assistant Registrar, and Registrar support staff

   - Academic Program Administrators

   - Student Services Orientation staff

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On-Site Activities: Agenda

- – Academic Advisors
- – Communications
- – Financial Aid and Veterans Affairs
- – Associate Vice Chancellor for Finance, the Cashier
- – Tour of the file room for Admissions and Registrar
- – Nursing staff
- – International Student Coordinator
- – Director of Global Honors
- – Two sessions with current students

Executive Summary

1. UW Tacoma's transition in 2005-06 from an upper division delivery only university to a full four year baccalaureate serving university has resulted in a hybrid admissions processing model of decentralized and centralized admissions. Dramatic increases in enrollment, coupled with a very manual process and inconsistent practices, is not sustainable or successful in meeting goals, deadlines, and efficiency measures.

    – There is confusion with the decentralized practice of admitting into a major for a transfer only population (which is the model of how graduate schools typically admit) and a centralized process that admits into a baccalaureate level, with a hand off to the major department if and where appropriate.

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Executive Summary

- Admissions is **the** centralized, university admissions office for undergraduate students. Admissions should be admitting to the institution first based on approved admission criteria for undergraduates according to two admission requirements: Freshman (FR) and Transfer (TR). Admission to the major is a secondary admission requirement at the undergraduate level.

  - This will significantly decrease turnaround time, expedite the letter of admission to the student, and increase the yield of good students who UW Tacoma is losing out on based on poor turnaround times.

  - Currently the decentralized admissions process piece is reported to be in conflict with the centralized advising process.

Executive Summary

2. The current homegrown Student Data Base (SDB) technology that UW Tacoma and Admissions is using coupled with the two additional solutions (the CollegeNet admission application and Recruitment Plus for CRM) are causing an additional workload, inefficiencies, and duplicate manual processes. With the UW Tacoma's status as a branch campus of the University of Washington in Seattle, adding staff and implementing upgraded CRM solutions become complicated processes through approval channels, but these possibilities could greatly enhance efficiencies.

Executive Summary

3. The office of admissions is functioning in silos and not as an integrated team which has created problems of consistency, timeliness, and accuracy that are impacting students and the campus.

   – The organizational structure within the office has not kept pace with university growth.

Primary Observations

1. There is a lack of consistency throughout the office in: policy, process, procedures, training, and professional development.

   - There are too many errors based on too manual of a process.

   - Lack of timeliness in all areas of the operations unit were evident: not meeting turnaround goals and university deadlines; inaccurate credit entry; delayed, duplicated and inaccurate letters to students; delayed entry of receipt of incoming transcripts, etc.

   - There is duplication and inconsistent processing of transfer evaluations. Articulations are not being documented in the SDB, causing delays for degree completion and inaccurate advising.

   - There are major communication breakdowns throughout the admissions office that are negatively affecting service to students, faculty, staff, and the public.

   - The culture of "the most consistency we've had in the office is inconsistency" must change.

Primary Observations

2. Since the arrival of the new Director of Admissions, the current functioning of the office has not allowed for a strong start for the new leader. There were reports of resistance to any change the new Director recommended, questioning of decisions, lack of respect, etc.

   – Authority lines are unclear and blurred. In order for the needed cultural change there are going to have to be agreements within the office. A clear understanding of the lines of authority, expectations, responsibilities, and an enforcement of the office rules.

     • The Director has knowledge and ability, but she is overwhelmed and struggling to keep afloat. She's battling the system and culture at every turn.

     • Rules for the office need to be spelled out and enforced.   See the "Rule of the House" example in the resources section of this report.

     • The Director has too many direct reports in order to be an effective leader.

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Primary Observations

- Staffing issues need to be addressed immediately. High instances of sick leave, progressive disciplinary issues, and staff choosing which tasks they want to do and how is causing more errors. Missing files and information is impacting searches and ultimately providing poor service to students.

  - The admissions office is not data driven and there is a lack of data and ability to run queries as needed for decision making. This is crucial for strategic planning and admissions success.

    - Enrollment Services (ES) divisions should have an assigned data analyst/computer support technician and ready access to data.

    - That there are no tools at the user level to obtain necessary access to data for informed decision making was cited repeatedly.

      - For example, the Director has limited access to data, and has developed limited enrollment data reports herself. There are limited automated reports of data metrics/reports.

Primary Recommendations

1. Quick remedies.

    – Assign the daily responsibility of cleaning up the error list to an experienced staff member. The error list should be extensively reviewed for accuracy and completeness.

      • An aging report needs to be added to the error report so **no** files go into a "black hole" for months. This should be responsibility of the new Assistant Director for Operations.

      • The list must be reconciled daily and errors corrected. The process needs to be defined in writing and followed consistently.

      • The coding problem regarding the 09 status review for the freshman admit letter (screen SRU522) can be corrected now. The time and errors that occur due to an automatic upload of the 'NEW' code are avoidable by correcting the automated upload of the code to TFO. This is an easy remedy to reduce extra workload and resulting errors for missed updates to the code.

Primary Recommendations

- There is a need to untangle the comingling of the University of Washington Seattle (UWS) SDB with UW Tacoma in order to reduce errors. This will need to be a detailed discussion with UWS regarding the reported problem of the application not loading and coding in the SDB correctly. There should not have to be any manual checks in the SDB to proof accuracy.

  ☐ The reported problem of CollegeNet's high error rate is connected to this issue, and when addressed should result in a reduction in the amount of errors on the application.

  ☐ Also this discussion will need to address the secondary request for transcripts. That should not be necessary in those cases where the student is already admitted.

- The assignment of letters within Recruitment Plus is an inefficient process and is difficult to navigate; it causes errors in assigning the correct letter due to the massive amount of letter codes to sort through. There are no automated communication plans or letter generation resulting in a cumbersome ten step process to print out a letter.

  ☐ An easy fix, in the interim, would be to catalog the letters by decisions, status, and level, formatted by breaks. For example: Freshmen decision: admit, deny, missing docs, etc.

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Primary Recommendations

- All letters should be maintained centrally, and not at the individual staff level.

- There should be no more than a dozen letter templates. The data per student should be merged into the standardized letter templates.

  ☐ All letters must be high quality; grammatically correct with no spelling errors, and with appropriate language.

- The letter of admission should be updated and only address admission to the university. Currently it is too customized, too cluttered and information is included that should not be there.   See the sample letter of admission in the resources section of this report.

- SDB SRU522 screen has all the information needed to load into an automated letter. These could be developed into an automated communication plans now.

  ☐ An example: The freshman $3,600 scholarship can trigger an automated letter so the system is capable of automated letter generation.

Primary Recommendations

- Admit packets are too large and there is too much information included, especially for first generation students and families.

  - Students interviewed complained of missing information that was in the packet which held up processes and caused missed deadlines.

  - Information to newly admitted students should be based on a timed communication plan in order of event/task and timelines. See the communication plan resources section of this report.

  - This process needs to be moved online. Students interviewed asked why they couldn't do all of this online and expressed there were too many places to have to run around and drop off documents.

    □ Example: Immunizations forms could be sent into a secure fax number.

- Based on how the transcripts upload by date, if a student calls in asking if their transcript has been received, it is not searchable by student name. Admissions has to ask the student the approximate time frame the transcript was sent, and then has to print all transcripts in the date range to find them. This is a huge waste of time and paper and is both very inefficient and costly.

Primary Recommendations

- There is a transcript searchable database and UWS has a model. Review the possibilities of the UWS model, or find a workable solution so the SDB is searchable, verifiable by the student's last name so there is no need to print.

  – Additional areas of unnecessary duplication of work:

  - Non-matric application process is a quick admit, and not a full admit process. There is no need to do credit evaluation for this status; only when the student applies as a regular admit.

  - Residency worksheet. There is no useful reason for the specialist to be filling out this additional form when all the information is already within the application and available in SDB.

    □ Admissions should be given access to update the residency code in SDB, and not to have to send the decision to Registrar's Office (RO) just to be loaded. Saving the form as a PDF, then uploading the form in order to file it is a duplication of work and unnecessary.

    □ Check with CollegeNet regarding the incorrect coding/loading to the application.

    □ Start and end dates for residency are unnecessary fields on the application and are causing additional entry errors.

Primary Recommendations

- The admit process needs to be streamlined and the amount of switchbacks between SDB, CollegeNet, electronic PDF, and Recruitment Plus needs to be reduced into one efficient process path. Specialists are jumping around too much in and out of solutions, copying over codes from SDB into letters, etc.

  – The responsibility lines of Admissions and Registrar with regard to the movement of the matriculated student file responsibility is vague, unclear, and should be following FERPA guidelines, records retention guidelines, and student file movement best practices.

    - Records retention, file maintenance, and the file audit should be the responsibility of an admissions leadership member; the new Assistant Director.

    - Admissions is the responsible office until student has officially matriculated. Those processes need to be clearly aligned under the admissions office.

    - The file audit is responsibility of Admissions. Clean/audited paper files should move to RO after the fourth week of the term and no later than eight weeks. See the resources section of this report for records retention.

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Primary Recommendations

- ☐ The audit list received from UWS is not user friendly or efficient to conduct the audit review. Received with SIS number only, it causes a huge workload to cross reference and locate student name. This needs to be addressed with UWS.

- ☐ The audit query list is backwards. The list needs to be corrected to pull those students who did matriculate, not those who did not. This will reduce the workload, clean up the file process, and expedite file move.

- ☐ As long as paper files are being maintained, they must be a in folder, clearly labeled, accessible, and searchable centrally for any staff member that is searching for the student's folder.

  - o All staff should be consistently following this process with no exceptions.

  - o Labels should include: term, year, name, level, student ID.

- – There needs to be better communication to stakeholders now of the current admissions processing status via email, weekly update, etc.

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Primary Recommendations

- Codes and student identifiers need to be merged fields to reduce errors from manual processes.

- There is too much lag time between scanning, indexing, and the review/upload to file process.

  - There should be standards developed by the new Assistant Director for the entire scanning/index process. Expectations should be less that one week.

  - The current process where a file has to be renamed and moved in order to be accessible by faculty is a very cumbersome process.

  - Indexing to the student file needs to occur at time of scanning, and be viewable by the departments.

  - Indexing should be by name, term, level, major. All these are available from the demographic information on the application, and in SDB.

  - This delay is causing students to send in duplicate transcripts, which causes additional workload throughout the entire process.

Primary Recommendations

2. Space and Staffing.

   – "People need to follow process, not process follow people". Organizational structure and space needs to be designed for optimal opportunity to achieve university and unit goals, to improve student service and student success.

     • The Operations and Recruitment teams of Admissions are all part of the same office, they must work together as one unit, one team. They must be located in the same space to support efficient, consistent service to students, if at all possible.

     • Walled offices should be prioritized for leadership staff who have a need for confidential conversations; Director, Associate Director, Assistant Director. Operations staff should not be located in walled offices as it creates silo management and prohibits teamwork and consistent processes. The walls need to come down in order to encourage teamwork, consistency, and collaboration.

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Primary Recommendations

- The new Assistant Director will need to hit the ground running, establish standards, consistency in process, and develop documentation.

  - Operations staff must be held accountable according to a single, best practice that is consistent and documented.

  - This position needs an experienced leader to move this team forward on necessary changes and instill trust, internally and externally.

  - The new Assistant Director will need to immediately establish expectations of the staff regarding behavior, professionalism, work ethic, rules of the office, and document this accordingly. See the resources section for the "Rules of the House" index.

  - Consider having the new Assistant Director take the online course in Admissions Management Leadership through AACRAO. See the resources section of this report.

Primary Recommendations

- The proposed reorganization of a processing/file completion staff partnered with a specialist/evaluator staff is a recommended change to reduce the volume of steps, workflows, coding, etc. that are currently expected of a single team.

- There are trust and job security issues with allowing strong student staff to handle data entry and coding. There must be adequate student staff to cover functions of areas assigned every work day, with back up so there is no work stoppage.

Primary Recommendations

- There needs to be one team doing all the evaluations/articulations of transfer and external credit.

  - Admissions currently has five experienced staff, while the Registrar's Office has one staff member doing updates and error cleanup before matriculate. This addresses issues identified by the academic side about inaccuracies.

  - There is no cross training or collaboration of these two teams. Questions on evaluations are being forwarded to one staff member in the Registrar's Office, which is creating additional student complaints due to inconsistent practices, especially since the staff member did not perform the admissions evaluation.

    - Consider an articulation training workshop on credit assessment, accreditation standards, best practice evaluations, basic articulation rules. See the resources section.

  - There is no trained international credentials evaluator. This task should be assigned at minimum to two evaluators on a part time basis for back up security. Training can be provided by AACRAO International Educational Services. See resources for IES training and AACRAO EDGE information.

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Primary Recommendations

- The position description for the position of evaluator should be updated to state minimum education level equal to a bachelor's degree for experience and competency.

- All evaluations must be completed in a timely manner, and accessible to central advising and the appropriate departments.

- The current mandated use of the UWS equivalency list does not serve UW Tacoma for course equivalencies. This needs to be addressed with UWS for a solution.

- Transfer Evaluation System or TES, and also DARS, were reported as available. If so, and if they are used correctly, this should reduce the error rates on evaluations.

- Currently after an applicant has a first initial evaluation, any further transcripts received for an updated evaluation are handed off to RO, even if not matriculated yet. This is still the responsibility of the admissions evaluation team. Once the evaluation team is centralized within one unit this will be resolved.

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Primary Recommendations

- Advanced Placement (AP) credit should be posted to the student record, the same as any other transfer credit, according the UW Tacoma AP policy within a timely manner before the student first term of attendance.

- The foreign language deficiency policy needs to be clarified and all processes streamlined accordingly.

  - A registration hold should be place by admissions the first term of attendance for any missing documentation for any admission requirements that are incomplete, i.e. foreign language documentation. Multiple communication reminders should be sent to the student during the first term. This situation needs to be resolved the student's first year of attendance, and should never be outstanding at the point of graduation.

Primary Recommendations

– Training needs to be consistent and scheduled for all new staff. Ongoing training needs to be occurring to update staff.

- The current "sink or swim" method is not working and adding to the inconsistency in processing amongst the operations team.

- An online training/procedures manual needs to be developed for each functional process area. Sharepoint is an example of an easy technology solution to build a procedures manual. See resources for Sharepoint and a procedures manual table of contents.

  □ Writing of each process should be determined by the leadership team based on content knowledge.

  □ Workload should be divided up, and assigned to staff to write the documentation (in a manageable way), **once** a consistent process is agreed upon.

Primary Recommendations

- Professional development should be offered and available to every staff member at a minimum of once a year.

  - Consider opportunities for the full office as a group and opportunities for the individual teams based on needs of the group; skills training, behavioral workshops, etc.

Primary Recommendations

3. Process, Procedure, and Policy.

    –   An immediate transition is needed to admit undergraduate (UG) centrally to the university based on the approved admission requirements according to two tracks: Freshman/first year (FR) and Transfer (TR).

        •   Admissions will need to work closely with the departments for an efficient, timely transition. Viewing of information within the system must be addressed first in order to **ensure** to the departments that the Office of Admissions is able to accomplish efficient, fast processing, no matter what the department deadline is.

        •   UW Tacoma program areas will need to assess impact on the program admit process and either;

            ☐   Approve to allow admissions to admit directly to the program according to university admission requirements, **or**

Primary Recommendations

□ Have admissions admit as undeclared into a pre-profession track. Further review by the program area will occur after the university letter of admission has been mailed out, or can occur once the student has matriculated. Discussion with each program needs to occur quickly regarding this decision.

o An exception to the above may be Nursing due to the pre-requisites for admission. Although based on the strong messaging that Nursing has communicated to applicants of minimum requirements to the program, one of the above two options may be possible.

Primary Recommendations

- All admissions policies should be posted in the catalog with annual review/updates approved by the Director of Admissions.

- The Associate Vice Chancellor for Enrollment Services and the Director of Admissions should consider, once the new Assistant Director is hired, to issue responsibility to the Associate and Assistant Directors for their budgets. This should assist with the office planning, and more efficient management within the division.

  - Training on budget management will need to be required.

- In many areas there are additional added processes that are not necessary or appropriate and many are based on mistrust.

  - Use of MATH 095 as a dummy course. This is not a good practice. This is a real course in the community college system. Change this to a check box – for Intermediate Algebra completed. This will reduce the amount of time spent on this process.

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Primary Recommendations

- There is no need to load admit decisions on the worksheet. What's most important is that is it loaded in the SDB. This is an unnecessary step.

- The process of hand loading in SAT/ACT scores into the worksheet since SDB is not view accessible to departments. Departments should have view access and be trained on how to use the university SDB system.

- The admission file should be reviewed for any missing documents at the point of application, and not when a transcript is received. The file should not be moved within the workflow for review unless the file is complete.

Primary Recommendations

- The grade point average (GPA) worksheet can be updated to be more intuitive for loading evaluation by institution, which calculates the GPA by counts of individual grades. This will expedite the process, and removes the human/manual error. See resources for GPA template example.
  - Manual loading and calculating all scores into the worksheet should be automated.
- Deadlines. There are too many deadlines and it's very confusing. A huge portion of this will be cleaned up once the office moves to a centralized admissions.
  - All deadlines should be reviewed and policies developed accordingly.
  - A final application deadline needs to be established per term.

Primary Recommendations

□ Example: The fall term final acceptance date for applications should be September first. This provides a minimum of three weeks for start of term processing, financial aid, advising, etc. to be completed, and allows the student a successful start.

□ For Winter, Spring and Summer terms the policy should be more flexible due to the tight turnaround times between terms, typically no later than the week before the first day of classes.

□ Late admits who meet the application deadline should have a set policy for acceptance. This should include a final date that admits will occur for each term and typically this date is set no later than the day before the first day of classes and this is for exceptional cases.

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Primary Recommendations

- Planning needs to occur for the next year cycle, 18 months ahead. There must be annual goals developed and assessment at the end of year based on results.

    - There should be an annual planning calendar for the entire office.

    - All communication plans should be developed and finalized for each level. See the resources section for an example of a communication plan.

    - Annual deadline dates need to be set for all admission materials to be ready for distribution by no later than August 1st of each year, and in sufficient supply based on last year's usage and coming year projections.

    - Timelines and goals should be established by each team within the office for the next admission cycle. These must be based on data from the past year, goals established for enrollment by the university for the coming year, goals within the area, and any demographic data that would affect those goals including census data, high school growth models, etc.

    - Every unit within Admissions should be setting annual goals for improvement, and the assessment for the measurement of those goals.

Primary Recommendations

- An annual timeline schedule needs to be developed for all areas/tasks and all staff need to be aware of the timelines.

  - *University undergraduate priority application deadline* for FR and TR must be established and communicated no less than eighteen months before the start of the term, and not altered with the academic year cycle so all appropriate messaging, recruitment and marketing materials are accurate and communicated correctly and in a timely fashion to potential applicants, families, high schools, counselors, and colleges. Rolling admissions would occur after the priority deadline to allow access as a secondary priority group.

- Turnaround time business metrics should be established annually for each task area. All metrics should be measured and assessed and staff routinely informed and able to view progress. Goals should be set in collaboration with the needs of students and stakeholders. For example, registration for orientation, financial aid processing, VA benefits, Global Honors, International admissions, etc.

Primary Recommendations

- CollegeNet application errors need to be addressed with CollegeNet and fixed. Codes need to come through correctly, required fields must be flagged as required, and the application should not push through without required fields completed.

  - Language on the application needs to request that the student identify any college credit taken while in high school and request an official transcript.

- The issue of the student identification number needs to be addressed in order to be issued earlier in the process instead of after the admit decision.

  - This can be related to the student in a secure manner.

  - This will allow the student portal access to check for online status.

- Procedures need to be standardized and documented from the apply to matric cycle, including the transfer articulation process.

  - All staff need to be trained and must follow the same procedure, and thus held accountable.

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Primary Recommendations

- This documentation should be accessible by view only access to all departments, stakeholders, etc.

- With an improved, efficient process, access to student online files and documents can be routed to the program areas quicker for review for admission to programs.

- Procedures must outline processing order by completed file date, and there should be no preference for a department, unless approved by the Director based on extenuating circumstances.

– The process to defer an application to a future term is too cumbersome, there are too many steps and potential for errors. This should be a simple one step process to duplicate the record to a new term while retaining the original term information in SDB. This area needs an IT solution.

Primary Recommendations

- A policy needs to be established of allowing one application deferment per year. A second deferment will be required to pay another application fee.

- The current process for electronic transcripts, or E-trans, for the Washington community colleges is inefficient. It defeats the purpose of an electronic delivery if upon receipt it requires a print copy in order to scan into SDB. This should be an automated upload. This needs to be on the IT priority list.

  - It does automatically articulate those courses in the system that have already been articulated. The articulation tables are for Washington community colleges only. Need to move to uploading articulation into Transfer Evaluation System (TES). This should be assigned to the new Assistant Director of Operations. It was noted that the Director of Admissions has been working on this area and there is improvement.

Primary Recommendations

- The non-cognitive review is currently being considered for borderline admission decision cases, with only one reader for decision. This process should be the decision of two or more readers, or an admissions committee process, particularly in the case of a challenge.

  - There is no scoring rubric for the non-cognitive process. Sedlacek's research provides multiple scoring rubric options. A documented scoring procedure should be implemented. See the resources section of this report.

Primary Recommendations

4. Communications.

   – Admission delays are affecting the entire campus, i.e. financial aid and veteran's affairs, in addition to the departments and central advising. There needs to be an understanding in admissions of the importance of their work as the initial first touch point for the student's success at UW Tacoma and the impact campus wide of the admissions process.

     • Regular communications must be going out to key stakeholders on campus about the status of the admissions process per cycle.

   – Hire a Communications Specialist to relieve the calls forwarded to the processing and evaluation staff and forwarded out to the programs. This will reduce the workload for all areas, reduce admissions load on program areas and transferred calls, improve relationships with academic areas, provide detailed expertise, and help put the "personalized" brand back into UW Tacoma.

Primary Recommendations

- It was repeatedly reported from multiple areas that the Enrollment Services (ES) front desk functions as a campus operator.

- This position establishes and answers the question of "who" to contact in Admissions. Responsibilities include managing intake calls and emails; answering all status questions, and answering process questions, deadlines, and policy questions.

- This position **must** have multiple trained backups.

- Student staff could still provide relief support for this position, but a full-time staff member is necessary for accountability and consistency.

- The ES Office Assistant can still serve as a back up, but with the new position this will reduce the large percentage of calls being transferred.

- A more robust CRM solution should be explored and vetted through an RFP process once the Communications Specialist is on board. See the resources section.

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Primary Recommendations

- The admissions website needs more detailed explanatory information geared to first generation students and families.

    - It is suggested that the site be reviewed by a local high school seniors focus group comprised of first generation students.

    - The site needs to be very clear, basic, and descriptive for students and families regarding the application and admissions process. Terminology should be defined and deadlines and timelines clearly listed, etc.

    - This will decrease phone call and email traffic.

- Admissions should be routinely conducting focus groups and surveys with applicants to obtain feedback regarding materials, processes, procedures, effectiveness, and areas for improvements, and then implementing the recommendations.

    - Veterans Affairs has conducted multiple student surveys and is willing to send on to Admissions the data on responses regarding the admissions process.

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Primary Recommendations

- CollegeBoard has an Admitted Student Questionnaire (ASQ) which could give insight into the process and needed areas of change. http://professionals.collegeboard.com/higher-ed/recruitment/asq

- SurveyMonkey is another resource to do fast, build your own surveys to get valuable feedback from targeted student groups. http://www.surveymonkey.com/mp/audience/

  – Regular office meetings must be established, and conducted at a time when all members can attend.

  - Always prepare and circulate an agenda at least twenty-four hours prior to the meeting so staff can review it and submit issues to be addressed.

  - The agenda should include the next meeting date, time and location. See resources for meeting agendas.

    □ The agenda needs to focus on the next cycle coming up for the office, what everyone needs to be aware of, current and new policies, processes, and changes internally and externally on campus. This will allow for improved communication, consistency, and efficiency.

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Primary Recommendations

- Consider occasional guest speakers from other key areas. This will help improve information, communication, and relationships. Also provide training and professional development at regularly scheduled meetings.

- There should be cross pollination at staff meetings with RO to promote teamwork and efficiencies in processes.

- The university cashier should be invited to an all staff monthly meeting and train the admissions staff on her role and what she can and can't provide for students. This would cut down on the number of students bounced around looking for answers.

- Meetings that should be occurring at a minimum are:

  □ Monthly all staff meetings. This works best if held the first hour of the work day and on the same day each month. Lead: Director

  □ Weekly leadership team meeting. Lead: Director.

  □ Weekly team meetings. Lead: Associate, Assistant Directors.

Primary Recommendations

– **All** staff should be required to maintain their schedule electronically with view access for all admissions staff, ES staff, and the Associate Vice Chancellor in order to better serve students and the campus.

- This needs to be turned on as soon as possible and all Admissions staff held accountable to keep their calendar current.

- Meeting Maker is currently being used by other offices on campus.

- Allocation of "view access" and "editor access" needs to be determined by each team leader and the Director.

- All staff must be required to post all time out of the office; vacation, sick leave, meetings, etc.

Primary Recommendations

- All phone calls **must** be answered and a call response metric should be set, usually within three rings.

  - **All** voice messages must be appropriately responded back to the caller, usually within 24 hours. This is a student service issue.

  - The Director should call into each of the staff member's phone and evaluate timeliness of response, tone, and overall customer service approach.

  - Customer service training is needed on student service, phone basics, appropriate professional language for all staff.

  - If a staff member is out, phone should be forwarded to a backup for prompt and efficient service.

  - Consider a phone tree for more efficient triage of calls.

  - Metrics need to be set for calls in all areas and performance measured according to those goals: hold times, call times, number of rings to answer, transferred calls, etc.

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Primary Recommendations

– Post policies, procedures, updates, corrections, timelines, and current status of processing to a shared site. Inform all necessary UW Tacoma staff of the site location. It should be updated monthly and campus wide notification communicated via email.

– Canned responses for email need to be developed, maintained in a databank and staff instructed to use those messages when communicating with students on routine communications. This will reduce misspellings, grammatical errors, use appropriate language, and reflect the quality of image of institution.

Primary Recommendations

- There has to be better communication with the departments. Departments stated they don't know who to call or contact in Admissions.

  - It is recommended that Derek and Lisa meet on a regular basis with the academic areas, *at their* staff meeting. This will improve communication, processes, and it's important to inform the academic areas of improvements in admissions. It displays a commitment to attend their meeting and listen to concerns. Bring update items, but don't dictate the agenda. There has been an attempt to do this but the departments complained that the meeting was prescribed to them and not an equal exchange of issues.

  - Admissions needs to produce an online directory with names, position responsibility areas, email and phone contact numbers, **and** keep it current. Post this on a shared drive that is visible to the campus. This would be a position responsibility for the new Communications Specialist.

Primary Recommendations

- The academic advisors have extended an invitation to the admissions operations unit for a joint training workshop to improve the working relationship and understanding of the impact of the admissions process for students. This would be a show of good will for admissions to accept the invitation.

- The departments need training not only on procedures, but on tools such as TES. There is not a basic level of understanding.

Primary Recommendations

5. Technology.

   – Part of the error rate within the office is due to having to cross load into SDB, CollegeNet, and Recruitment Plus.

     • That the progression doesn't move from one to the other is cumbersome and creates confusion.

     • Codes aren't automatically updated and the systems are not fully integrated, causing multiple duplicate entry points.

     • Lists are received from SDB in a numeric format, which causes a secondary process to identify student names.

   – UW Tacoma needs a single, integrated SIS system.

   – Consider joining EDI, Electronic Data Interchange (national electronic transcript exchange), for receipt of college transcripts electronically.

     • The benefit of joining EDI needs to be assessed based on volume from key feeder institutions.

Primary Recommendations

- Consider looking into EDI Electronic Data Interchange as a trading partner.

  http://registrar.utexas.edu/speede/

– Admissions should have authority and access to all admissions needed screens in SDB. This is a work stoppage issue. For example, updates to the residency code, loading in an application received dates, etc.

– Electronic Washington Community College (WA CC) transcripts are currently being received. They are printed off and then scanned into system.

- The printing step defeats the purpose of receiving the transcript electronically. Place a work order now for IT to research a possible crosswalk automated upload.

- There is automated articulation for the WA CC.

Primary Recommendations

- There is a need to implement a single course articulation tool for students to do self online evaluations, particularly based on the high percentage of transfer students. This should be on the priority list for technology solutions as it would cut down on emails, phone calls, etc.

- There is quite a bit of confusion regarding the current codes that exist. This area needs to be addressed.

  - The code list needs to be reviewed and updated by an experienced admissions staff member and IT.

- Admissions should be assigned their own IT staff member.

  - Not only to troubleshoot existing problems for the office, but clean up electronic processes, manage ongoing technical issues, gain efficiencies, streamline processes, and recommend and implement needed solutions quicker.

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Primary Recommendations

- In discussions about a student portal, there was quite a bit of confusion as to whether or not UW Tacoma had a student portal.

  - IT was noted that the lack of an integrated SIS is a factor and that UW Tacoma is behind it's peers in this area of online service to students.

  - While more and more of UW Tacoma processes are moving online, it was stated by many of the department contacts that students are not able to check their status online. This may just be a communication issue, but if processing is delayed, the portal for status check is not very useful.

  - A demonstration by Derek and Lisa to the departments about the portal would be very useful and cut down on misinformation.

  - A possible CRM solution could help in this area once a Communications Specialist is hired.

Primary Recommendations

6. Additional areas of concern for success.
   - The lack of ability for students to pay by credit card for the application and the confirmation fee.
     - Students interviewed asked me why they cannot pay online like other universities.
     - Once a student is admitted they should be able to pay the confirmation fee and not have to wait till the May 1st deadline. This is a important yield benefit to UW Tacoma, particularly for high achieving students.
     - This would require a policy be drafted for refunds for those students who cancel admission before May 1st.
     - This could be benchmarked with peer institutions for a best practice solution.
     - Consider electronic checks online.

Primary Recommendations

– Review the Graduate Schools' home grown portal model for possible application to undergraduate admissions. The contact is Julia Carlson, Director of Graduate Enrollment.

– It is worth noting, that one of the department's on campus recently hired there own part-time recruiter.

- It will be imperative that the Associate Director for Recruitment make a connection with this department and inform them of recruiting rules and guidelines.

  □ Many high schools have strict rules on access, and allow only one visit per institution annually.   This could prohibit the admissions office, whose job it is to recruit to the university for all majors, from having access to a high school since the slot UW Tacoma is allowed was already taken by a department recruiter.

  □ So as not to prohibit the generalist admissions staff member access and lose the ability to address all majors, Admissions should notify all departments of high school recruitment restrictions, and request departmental recruiters scheduled before hitting the road.

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Primary Recommendations

- High achieving (Global Honors) and International students appear to be more of an afterthought. If the university is committed to attracting high achieving and international students, both areas must be included in planning, communication, access, and contacts.

  - The international application was just completed and available in December, but now is reported to not be downloading correctly. This is a priority and must be addressed immediately. The application launch delay put the application process for international applicants at only less than two months before the university application date. Based on the time it takes for an international application this is unacceptable and will affect international enrollment numbers.

  - The international office should be involved in the admissions planning cycle, and admissions needs to invite them partner in the creation of an international communications plan.

    - Recruitment Plus does not work on the international admission staff member's system, so she is maintaining a shadow system. This is a duplication of work.

Primary Recommendations

- □ The international office stressed the huge amount of time that is spent on admissions functions based on many of the same issues identified in this report, which is significantly impacting the time needed for matriculated students.

- Global Honors isn't able to contact high achieving students regarding the UW Tacoma program till one month before term starts. This is way too late. High achieving students are aggressively recruited by peer institutions and have options, and those other options have commitment timelines in the spring. Global Honors should be involved in the admissions planning cycle. Admissions needs to invite them to the table to create an high achieving communications plan.

  - □ The high achieving communication plan should include information about UW Tacoma's policies for advanced standing credit; Advanced Placement (AP), International Baccalaureate (IB), College Level Examination Program (CLEP), etc.

Resources

1. Records retention guidelines.

    – Stanfield, S. (2010). *AACRAO's Retention of Records: Guide for Retention and Disposal of Student Records 2010 Update.* AACRAO.

2. Admissions management training. AACRAO. *Managing the Admissions Office: For New and Aspiring Admissions Managers*. This is available in two formats:

    • At the next AACRAO Annual Meeting in Philadelphia, Pennsylvania, US. Dates are: April 1 - 4, 2012. The full day workshop is held on the first day of the conference Sunday, April 1, 2012. http://www.aacrao.org/meetings/future-meetings.aspx

    • Take the training via webinar. http://www.aacrao.org/meetings/online-courses.aspx

Resources

3.   Sharepoint. http://sharepoint.microsoft.com/en-us/Pages/default.aspx

4.   AACRAO Consulting can provide an articulation and transfer credit workshop. Please contact Nicole Spero, at speron@aacrao.org.

5.   Admissions best practice guidelines:

   – Lauren, B.   (2008). *The College Admissions Officer's Guide.* AACRAO.

6.   Online college catalog access through TES College Source Online:

   – http://www.collegesource.org/idxparticipate.asp

Resources

7. Meeting agenda resource:
   http://www.effectivemeetings.com/meetingplanning/index.asp

8. Explore products to improve and streamline communications **after** a Communications Specialist is in place, trained, and canned responses are being built. Examples of solutions:

   – This will aid in triage, uploaded responses, email management, and quick answer content in order to "answers students' questions instantly, building a continually evolving answer content database as more students use it ."

     • EMT Hobsons EMT http://www.hobsons.com/products/enroll/kb.php

     • EMAS Pro/Campaign Pro   http://www.emaspro.com/enrollment-management-solutions/index.php#enrollmentmanagement

     • Talisma CRM http://www.talisma.com/en-us/products_services/talisma_crm/Pages/TalismaCRM.aspx

Resources

9. 2012 AACRAO Transfer Conference, July 1 - 3, 2012 (Sunday-Tuesday). Palmer House Hilton Hotel, Chicago, IL. http://www.aacrao.org/meetings/future-meetings.aspx

10. Academic record and transcript guide.
    - American Association of Collegiate Registrars and Admissions Officers. (2011). *AACRAO 2011 Academic Record and Transcript Guide*.

11. AACRAO Transfer Credit Practices. http://tcp.aacrao.org/

12. AACRAO IES International Educational Services. http://ies.aacrao.org/training/

13. AACRAO EDGE. http://edge.aacrao.org/aacrao-edge-login-page.php?uri=/

Resources

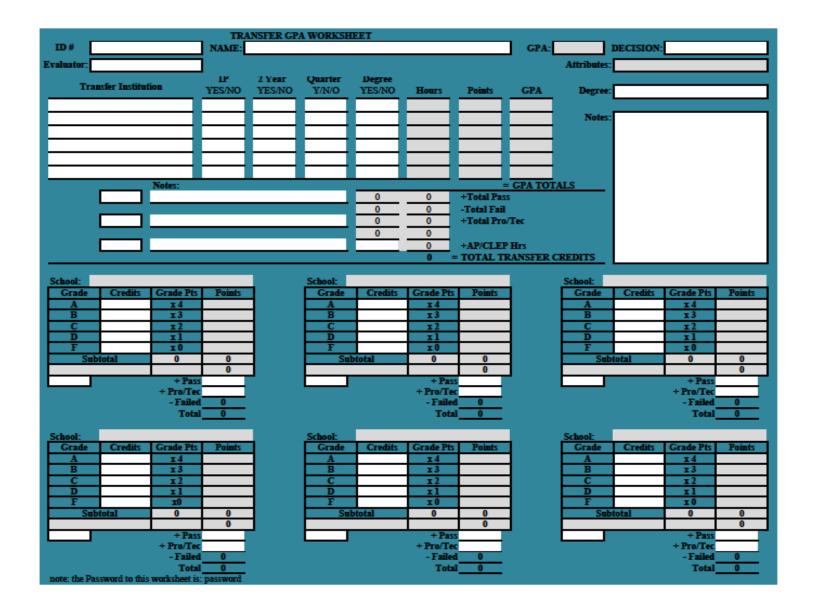14. Non-Cognitive assessment and scoring rubrics:
    Sedlacek, William E. (2004). *Beyond the Big Test.*

15. Transfer and Award of Credit Joint Statement.
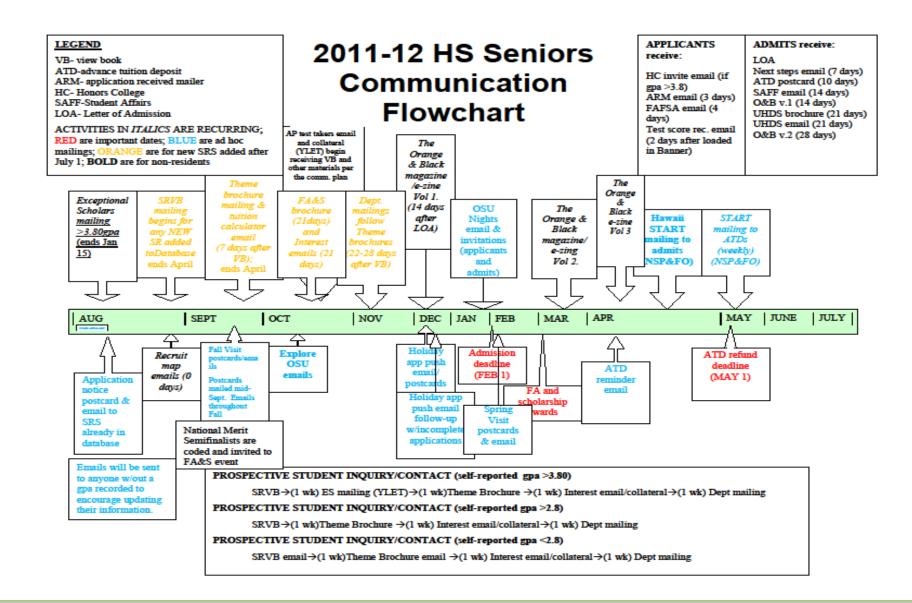   – http://tcp.aacrao.org/misc/joint_statement.php

Resources

Sample Procedures Manual

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2011-12 HS Seniors Communication Flowchart

APPLICANTS receive:

HC invite email (if gpa >3.8)
ARM email (3 days)
FAFSA email (4 days)
Test score rec. email (2 days after loaded in Banner)

ADMITS receive:

LOA
Next steps email (7 days)
ATD postcard (10 days)
SAFF email (14 days)
O&B v.1 (14 days)
UHDS brochure (21 days)
UHDS email (21 days)
O&B v.2 (28 days)

AP test takers email and collateral (YLET) begin receiving VB and other materials per the comm. plan

Exceptional Scholars mailing >3.80gpa (ends Jan 15)

SRVB mailing begins for any NEW SR added toDatabase ends April

Theme brochure mailing & tuition calculator email (7 days after VB); ends April

FA&S brochure (21days) and Interest emails (21 days)

Dept. mailings follow Theme brochures (22-28 days after VB)

The Orange & Black magazine /e-zine Vol 1. (14 days after LOA)

OSU Nights email & invitations (applicants and admits)

The Orange & Black magazine/ e-zing Vol 2.

The Orange & Black e-zine Vol 3

Hawaii START mailing to admits (NSP&FO)

START mailing to ATDs (weekly) (NSP&FO)

AUG | SEPT | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUNE | JULY

Recruit map emails (0 days)

Fall Visit postcards/emails

Postcards mailed mid-Sept. Emails throughout Fall

Explore OSU emails

Holiday app push email/ postcards

Admission deadline (FEB 1)

ATD reminder email

ATD refund deadline (MAY 1)

Application notice postcard & email to SRS already in database

National Merit Semifinalists are coded and invited to FA&S event

Holiday app push email follow-up w/incomplete applications

Spring Visit postcards & email

FA and scholarship awards

Emails will be sent to anyone w/out a gpa recorded to encourage updating their information.

PROSPECTIVE STUDENT INQUIRY/CONTACT (self-reported gpa >3.80)

SRVB→(1 wk) ES mailing (YLET)→(1 wk)Theme Brochure →(1 wk) Interest email/collateral→(1 wk) Dept mailing

PROSPECTIVE STUDENT INQUIRY/CONTACT (self-reported gpa >2.8)

SRVB→(1 wk)Theme Brochure →(1 wk) Interest email/collateral→(1 wk) Dept mailing

PROSPECTIVE STUDENT INQUIRY/CONTACT (self-reported gpa <2.8)

SRVB email→(1 wk)Theme Brochure email →(1 wk) Interest email/collateral→(1 wk) Dept mailing

Resources

Next four slides are a position description example for a Communications Specialist.

Brief Position Description
The Customer Service Representative performs a wide range of office support, technical, and/or minor administrative or business-related tasks in support of campus programs or operations.
Position Summary
Brief Position Description
The Customer Service Representative performs a wide range of office support, technical, and/or minor administrative or business-related tasks in support of campus programs or operations.
Position Summary
The purpose of the Office of Admissions is the recruitment of prospective students, responding to requests for admissions and general university information, and processing applications for admission from freshmen, transfer, graduate, and international applicants. The Office of Admissions is often the first point of contact for potential students. Therefore, positive public relations are absolutely essential. This is a service-oriented position. It requires friendliness, patience, and courtesy along with the ability to deal with a diverse population. This position represents Oregon State University and the Office of Admissions. Incomplete or inaccurate information could result in the potential student missing required deadlines or being denied admission to the university. This position requires constant contact with diverse clientele. It requires intense knowledge of OSU requirements, college majors and departments and the ability to retain often changing policies, rules, and regulations. This position works in a fast-paced, high-volume environment. The position requires skill in independent decision making and daily PC use. This position frequently lifts 50lb. The incumbent must have a clear understanding of the entire Admissions operation i.e. dates, deadlines, computer systems, and who is responsible for each activity. Must have knowledge of requirements of OSU departments/colleges. Is expected to complete work in a timely manner to positively affect office workflow related to admission evaluations and service to students, faculty, staff and the general public. Must be able to work in a fast-paced, multiple priority environment with constantly changing rules, regulations, policies, and deadlines. Requires a person who will remain on task, work in a team setting and possess excellent communication skills. Requires the ability to prioritize and work under pressure.

Resources

Decision Making/Guidelines

 The incumbent must be well-versed regarding policies implemented by the Office of Admissions and the University as well as the state and federal guidelines. Reference is made to Admissions and the University publications and the BANNER Student Information System, NOLIJ, OUS and OSU Rules and Regulations. The employee uses established guidelines to enter data in BANNER, NOLIJ, find files in the office and answer questions from our customers. The knowledge of policies and guidelines allows accurate and appropriate release of information. Decisions include admission requirements, which application to complete, and other documents that one must submit. Determining how the prospective student can meet acceptable requirements. Determining who to refer the student to depending on the questions asked by using the established procedures. In addition, decisions must be made when determining who will receive and answer what pieces of mail. Must provide advice and make decision on courses that apply for transfer credit. Requires the ability to consider if a student's application meets minimum university requirements. Must be able to determine what (if any) information can be given to a third party. Must advise international students on scores/credentials.

Decisions in any of these areas should be accurate, timely, and efficient as they may impact not only a student's admission application, but also the time-sensitive responses of other Enrollment Management departments such as Financial Aid/Scholarships, Student Orientation and Retention, and academic departments as well.

This position requires a clear and unambiguous commitment to compliance of all National Collegiate Athletic Association (NCAA) regulations for Division I (FBS) universities.

Resources

Minimum Qualifications

Bachelor's Degree. Two years of general clerical experience. One year of which included typing, word processing, or other experience generating documents; OR An Associate's degree in Office Occupations or Office Technology; OR Graduation from a private school of business with a Certificate in Office Occupations or Office Technology and one year of general clerical experience. College courses in Office Occupations or Office Technology will substitute for the required experience on a year-for-year basis.

Additional Required Qualifications
This position requires answering a high volume of phone calls (over 1000 calls per month) and emails (over 1500 per month). The individual must have strong communication skills both verbal and written. The individual should have experience with a fast-paced, time sensitive environment and be able to multi-task and stay focused. The individual needs to have fee processing experience. Experience with the Banner system, NOLIJ document imaging system, and with application processing is preferred. Applicant must be able to carry 50lb. Must be competent in using Banner SIS, Microsoft Windows, Email, Word Processing, and spreadsheets. Able to independently research, assess, and retrieve information from the internet. Provide an receive information in person, by phone, or electronically. Explain information regarding specific programs or services provided by the University. Provide in-depth technical information regarding policies, procedures and programs. Ability to sit at a keyboard/computer/workstation for the majority of a work day and type 50+ words per minute. Preferred qualifications include a demonstrable commitment to promoting and enhancing diversity.

Resources

Position Duties
45 % I. Phones and Walk-ins: Logs onto Automatic Call Distribution System and answers phones throughout the day. Answers incoming calls from prospective students, their families and departments on campus. Greets and answers questions from walk-in customers. Responds to questions about admission standards and general university information such as housing, financial aid, scholarships, etc. Must be able to convey all of the admission requirements including which application to complete for domestic and international undergraduate/graduate; postbac or non-degree seeking students. Must have a high level of working knowledge of the processes, rules, regulations, functions and programs this office is responsible for. Specific knowledge regarding individual departments, additional admission requirements, professional requirements, and special requirements such as Conditional/Provisional/English Language Requirements are required. Must know policies on fees, deadlines, GPAs, appeal procedures and alternative admission requirements. Must interpret and provide advice on courses that apply for transfer credit. Requires the ability to communicate with a diverse clientele in a courteous, pleasant, tactful and professional manner, which includes the ability to communicate with department heads about any necessary action. Must be able to accurately access Student Information System for data retrieval, data assessment and data input while talking on the phone and entering data simultaneously. Must accurately adhere to FERPA (confidentiality) guidelines.
10% II. E-Mail: Sorts, routes and responds to a high volume of email request for information. Email must be answered in a 24 hour period.
10% III. Mail: Receives and routes mail to correct area. Includes carrying heavy mail bins, opening mail, date stamping, sorting, and delivering mail.
20% IV. Document Imaging and NOLIJ Transfer: Works with a rotating schedule scanning and indexing documents using NOLIJ. Scanning includes preparing documents, putting documents into batches, and adjusting scanner for re-scanning documents.
5% V. Applications: Process Non-Degree applications in a 48-hour turn-around time period. Pushes undergraduate web applications into the system, inputs graduate application information and generates departmental action forms.
5% VI. Fees: Process application fees and deposits (checks, credit cards). Responds to requests for refunds, inputs no-fee applications, processes fee deferral requests, prepares daily deposits, and deals with fraudulent credit cards and chargeback notifications.
5% Various other duties as assigned by management staff. This may include; recruit data entry, transcript processing, and entering of test scores.

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"Rules of the House" Office Policies: Example

Table of Contents:

Organizational Chart

Orientation Policy and Procedures

    Payroll

    Working in Admissions

        Office Hours

        Lunch/Breaks

        Personal Appearance/Office Dress

        Confidentiality

        Personal Phone Calls & Email FERPA

        Playing on the Computer

        Personal belongings

        Calling in when ill or need to be absent

        Vacations

        Cross training, your back up responsibilities

    Discrimination & Sexual Harassment

Position description, Job Duties

Relationship with your Supervisor

Relationship with your colleagues

General Safety Policies & Rules

Evacuation Procedures

First Aid

Recognizing First Aid Emergencies

Calling for Help

On the Job Injuries

University of Washington Tacoma, Admissions Operations Review, January 9 -11, 2012

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Sample Letter of Admission template with merged student data:

Student detail:
Name and mailing information
Identification Number
Term admitted for
Student type
   (Bachelor, Master, PhD)
College admitted to
Fee status
   (Resident, Non-Resident)
Major/program admitted to

Final documents needed:
Identifies any final needed
documents for admission

Office of Admissions
Oregon State University, 104 Kerr Administration, Corvallis, Oregon 97331-2106
T 541-737-4411 | F 541-737-2482 | http://oregonstate.edu/admissions

Oregon State
UNIVERSITY

July 7, 2011

«FNAME» «LNAME»
«STR1»
«STR2»
«CITY», OR «ZIPC»

Dear «FNAME»,

It is my pleasure to inform you that you have been admitted to Oregon State University. Congratulations! We are proud of Oregon State and are very pleased to welcome you to the OSU community.

Your application fee is valid for one term change within an academic year. Requesting more than one subsequent term change or a change to a different academic year will require submission of a new application for admission and fee. You will need to contact the Office of Admissions if you wish to change your term. Review the information below:

Student ID: «IDNODASH»   Term: «TERM»
Student Type: «STUDENT_TYPE»   College: «ACOL1»
Fee Status: «ARESD»   Major: «AMAJ1»

Please have the following official document(s) sent to OSU Admissions as soon as possible.

Final High School Transcript – Westview HS w/grad date

All outstanding admissions documents must be provided before the end of your first term. You will not be allowed to register for your second term unless these documents are received by the Office of Admissions. If you have been admitted to Fall term and are applying for scholarships, please note that all of your admissions materials except for the high school transcript must be received by the Office of Admissions by February 1. Submit your final high school transcript once the graduate date has been posted on it. Completing the Foreign Language Coursework requirement at Oregon State University may result in additional tuition and fees.

If you have any questions, please do not hesitate to contact us. Again, welcome to OSU!

Sincerely,

James Day
Director of Admissions
Oregon State University

AACRAO
CONSULTING
Providing Best Practice Solutions

Respectfully Submitted,

Michele Sandlin

AACRAO Senior Consultant

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Project Summary

UW Tacoma hired a consultant from AACRAO (American Association of Collegiate Registrars and Admissions Officers) to provide an expert review re:

–Development of an applicant/student centric admissions model and processes.
–Improved stakeholder experience and outcomes related to admissions.
–Improved overall organizational effectiveness and coordination.
–Streamline processes related to:
  - Eliminating waste.
  - Decreasing errors.
  - Improving timelines.

The goal of the consultation was for the improved model and processes to enhance the timeliness, accuracy and quality control, and customer services in the following areas:

–File assembly and management.
–Coordination of admission to majors.
–Communication with prospective and applicant students.
–Evaluation and awarding of transfer credit.

AACRAO Senior Consultant Michele Sandlin conducted a three day on-site consultation on January 9 - 11, 2012, with UW Tacoma to review the university's organizational model for Admissions' functions and services. Specific review was made of centralized versus decentralized aspects of admission operations.

Executive Summary

1. UW Tacoma's transition in 2005-06 from an upper division delivery only university to a full four year baccalaureate serving university has resulted in a hybrid admissions processing model of decentralized and centralized admissions. Dramatic increases in enrollment, coupled with a very manual process and inconsistent practices, has resulted in an undergraduate admissions model that is not sustainable or successful in meeting goals, deadlines, and efficiency measures.

   –There is confusion with the decentralized practice of admitting into a major for a transfer only population (which is the model of how graduate schools typically

admit) and a centralized process that admits into a baccalaureate level, with a hand off to the major department if and where appropriate.

2. The current homegrown Student Data Base (SDB) technology that UW Tacoma and Admissions is using coupled with the two additional solutions (the *CollegeNet* admission application and *Recruitment Plus* for CRM) are causing an additional workload, inefficiencies, and duplicate manual processes. With UW Tacoma's status as a branch campus of the University of Washington in Seattle, adding staff and implementing upgraded CRM solutions become complicated processes through approval channels, but these possibilities could greatly enhance efficiencies.

3. The office of admissions is functioning in silos and not as an integrated team, which has created problems of consistency, timeliness, and accuracy that are impacting students and the campus.

   –The organizational structure within the office has not kept pace with university growth.

Recommendations

The consultant provided a list of recommendations to address the issues identified in her full report. Enrollment Services and the Office of Admissions in particular are actively engaged in addressing these issues.

The campus has retained the consulting services of Ms. Sandlin for a period of up to one year, with monthly site visits, to draw upon her expertise, experience and resources in supporting admissions improvement.