Enrollment Management Working Group

Final Report

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Table of Contents

Executive Summary

The charge of the Enrollment Management Working Group (see membership in Appendix A) is to design an operational model for Enrollment Services at The University of Texas Rio Grande Valley that maximizes the use of technology, information analysis and innovative processes. The model created will assist UTRGV in promoting access and maximizing success for the students of South Texas, the United States and the global community.

The Enrollment Services model discussed in this report is designed to revolutionize the delivery of higher education services. In keeping with the Project South Texas Guiding Principles, the following philosophies directed discussions and recommendations:

- Utilize technology to implement dynamic, interactive, multi-lingual communications and paperless processes
- Create service solutions versus service rules
- Provide for data informed planning and decision making
- Develop processes that empower students to persist, achieve and create lifelong connections with UTRGV

To provide consistency, this report is organized into six categories:

I. Organizational Design

   o Enrollment Services is fundamentally responsible for providing a gateway that optimizes student enrollment while maintaining academic expectations and delivering efficient service. UTRGV Enrollment Services will preserve this essential role by attaining synergy among functional areas to promote access, build a diverse academically qualified student body, and maximize operational effectiveness. A high-level structure for Enrollment Services including reporting offices and functions is provided in this section. As a distinct function of Enrollment Services, the importance of data analysis and use of business intelligence to inform decisions across UTRGV units is also addressed.

   o Recommendations
      - Create an Enrollment Services Division.
      - Hire a Vice President of Enrollment Services with a direct reporting line to the UTRGV President.

• Include the following offices and functions within the EM Division:

Admissions	Recruitment & Marketing
Business Intelligence	Registrar
Call Centers	Scholarships
Enrollment Service Centers (includes Student Accounts)	Student Money Management Center
Financial Assistance	Testing
Orientation	Veterans Services

II.   UTRGV – Prepare in the Cloud

o   UTRGV Enrollment Services is committed to using advanced technology to promote early awareness, provide student-centered streamlined services, and eliminate enrollment road blocks. This initiative addresses implementation of a K-12 bi-lingual portal; testing centers; relationship management and marketing; and automation of fundamental processes. Beginning in middle school, students will use the K-12 portal for career planning/exploration and college portfolio creation. The portal will also provide a tuition savings account option for parents and students. Students will have the ability to test (ACT, SAT, etc.) in state of the art facilities and on demand if needed. Targeted communications using a dynamic Customer Relationship Management System and effective marketing will be used to recruit highly qualified students. Finally, student driven online services will be provided to increase efficiency and diminish redundancies.

o   Recommendations
   • Develop a student/counselor/parent bi-lingual portal which allows for early college planning, career exploration, and electronic portfolio building beginning in middle school.
   • Provide opportunity for students/parents to save for college by creating the UTRGV tuition savings account within the portal.
   • Provide a tuition discount for students using the tuition account option.
   • Create testing centers that are easily accessible and include the latest technology.
   • Implement a robust Customer Relationship Management System (CRM) to effectively and efficiently communicate with students.
   • Fully integrate next generation technology to streamline processes and eliminate the reliance on paper documents.

III.   The Debt-Free Degree

o   Student loan debt is increasing and poses a particular problem for students who do not complete or take a considerable amount of time to complete their academic program. First generation and lower socio economic students are at greater risk as they are not as knowledgeable about managing financial resources. UTRGV will seek to eliminate or significantly reduce the dependency on student loans by implementing the Debt-Free Degree program. Establishment of a Student Money Management Center, creation of a school district curriculum partnership program, and implementation of a default management plan are the primary focus of this program. The Student Money Management Center will provide a proactive approach to financial literacy and personal educational planning. The school district curriculum partnership will be designed for early graduation of students entering with college credit taken in high school. The default management plan would concentrate on providing mechanisms for maintaining a low default rate.

o   Recommendations
*   Create a fully functional and effectively staffed Student Money Management Center.
*   Establish school district partnerships that ensure graduation within 2-3 years for students with prior college hours.
*   Develop a comprehensive default management plan.
*   Allocate funding for the use of full service third party management providers to assist with maintaining a low default rate.

IV.   The Global Initiative

o   UTRGV will expand its sphere of influence in the global community in multiple ways, including higher education, research, service, and the cultivation of partnerships. UTRGV Enrollment Services will create various multi-language platforms to attract and recruit highly qualified international students. These include the use of international recruiters, multi-language websites, and eRecruitment initiatives. By partnering with institutions in other countries to accelerate degree completion and by providing physical and virtual community centers, UTRGV will intensify engagement, bolster relationships, and increase student success.

o Recommendations
- Hire staff specifically for international recruitment.
- Utilize international recruitment companies to assist with recruitment in specified international markets.
- Offer joint admission and articulation agreements with other international higher education institutions.
- Create physical and virtual community centers for international students.

V. La Promesa: Our 4-year pledge

o The success of students is our primary responsibility and we are committed to providing students with the support necessary to graduate in 4 years. Several strategies have been identified to achieve this goal. Holistic admission standards ensuring a diverse and academically prepared freshmen class will be created. A comprehensive orientation program will be designed to maximize student engagement and instill a sense of school pride. A one-stop student delivery model will be implemented by creating physical and virtual bi-lingual Student Service Centers in multiple locations. Business intelligence technology will be utilized to improve retention and clear graduation roadblocks. A Graduation Achievement Office will assist students on their path to degree completion.

o Recommendations
- Develop holistic admission requirements.
- Create comprehensive on-line and on-campus orientation programs.
- Establish physical and virtual bi-lingual Student Service Centers.
- Make informed decisions by using business intelligence technology to analyze data.
- Establish a fully funded and staffed Graduation Achievement Office to proactively assist students on their path to graduation.

VI. Enrollment Services Functions

o Offices within UTRGV Enrollment Services must provide efficient and effective service. To avoid duplication and ensure optimization of resources, the decentralization and centralization of processes is essential. This section identifies processes the must be addressed in the near future.

- o Recommendations
  - • Begin second phase discussions immediately using critical startup elements as the foundation for dialogue.
  - • Determine processes that should be centralized versus decentralized to ensure optimal student service.

Implementation of these initiatives and recommendations will enable UTRGV to become one of the largest and most successful Hispanic-serving institutions in the U.S.A.

Critical Startup Elements

In order to meet the August 2015 opening of UTRGV, many Enrollment Services decisions need to be made by August 2014 as shown in the table below. Appendix "B" provides a more detailed list of decisions needed in 2014-2015.

CRITICAL ISSUES	DECISION DATE
Decision on Communication Relationship Mgmt System	3/1/2014
Dept of Education Discussions for Fin Aid	3/1/2014
SIS User Access	4/1/2014
ACT Code	5/1/2014
ETS/SAT/ATP Code	5/1/2014
Academic Term Calendar	5/1/2014
Admissions Processing Decisions	5/1/2014
Apply Texas Setup	5/1/2014
Admission Requirements & Deadlines	5/1/2014
Vendor Agreements (i.e. College Source, Guidebook, etc.)	5/1/2014
Degree Programs (College, Dept, Degree, Major)	6/1/2014
Admission Requirements to Board of Regents for Approval	6/1/2014
Recruitment & Admissions Staff Training	7/1/2014
Recruitment Calendar of Events	7/1/2014
Recruiter Assignments/Territories	7/1/2014
Recruitment Contracts (Purchased Lists, Noel Levitz, Transfer	7/1/2014
Recruitment Presentations	7/1/2014
OPEID/FICE Code Fall 2015 Application Cycle	8/1/2014
Communication - Admissions	8/1/2014
Marketing Pieces	8/1/2014
SIS User Training	8/1/2014
Student ID/Logon protocol	8/1/2014
Data Loads	8/1/2014
Enrollment Services Websites and UTRGV student portal	8/1/2014
Financial Aid Set Asides & Institutional Aid Programs	8/1/2014
Scholarship Allocation, Application, Criteria, & Awarding	8/1/2014

I.   ORGANIZATIONAL DESIGN

Enrollment Services (ES) is an integral part of a University's structure. After extensive research, the EM working group recommends the creation of an Enrollment Services Division lead by a Vice President with a direct reporting line to the UTRGV President.

Efficient administration of enrollment processes is fundamental function of Enrollment Services. The recommended ES Division structure will ensure continuity and well-organized management of student services prior to enrollment and through graduation.

The EM Division should include the following offices/functions:

Admissions	Recruitment & Marketing
Business Intelligence	Registrar
Call Centers	Scholarships
Enrollment Service Centers (includes Student Accounts)	Student Money Management Center
Financial Assistance	Testing
Orientation	Veterans Services

A clear understanding of data is an equally important function and is essential for informed decision making across UTRGV units. The EM Division will use data warehousing and business intelligence technology to equip UTRGV with data needed to support student success and reduce time to graduation. For example, the analysis of enrollment trends and degree audit data allows for the creation of a strategic class schedule that will meet student demand and fulfill graduation requirements.

Analysis of current enrollment, retention, and graduation rates for UT-Brownsville and UT-Pan American provide the foundation for UTRGV data. The table below provides Fall 2012 Coordinating Board reported retention rates and Fall 2009 reported graduation rates:

	Retention Rates		Graduation Rates	
Institution	Fall 2012 FTIC	1st Year Retention	Fall 2009 FTIC	4 Year Grad Rate
UTPA	2,891	76.3%	2,692	16.9%
UTB	653	65.4%		
UTB/TSC			428	11.2%

Using current data, projected enrollments for UTRGV were calculated. These projections do not take any new admission requirements into account, since those decisions have not been made. Based on entering freshmen enrollments for UT-Brownsville and UT-Pan American, the projected enrollment for the Fall 2015 UTRGV entering freshmen class is 4,700. Total projected enrollment for Fall 2015-Fall 2020 is shown in the table below.

Projected Enrollment			
Student Population	**Fall 2015**	**Fall 2018**	**Fall 2020**
New Freshman	4,700	4,982	5,231
New Transfers	1,769	1,875	1,969
Continuing Undergraduates	19,550	20,723	21,759
New Graduate and Professional	927	983	1,032
Returning Graduate and Professional	3,692	3,914	4,109
Total Enrollment	30,638	32,476	34,100

II.   UTRGV – Prepare in the Cloud

UTRGV will assist students with college awareness and preparedness by providing electronic services for students beginning in middle school. These services will engage students early, promote college access, minimize admissions/enrollment steps, and increase efficiency to ensure early admission to UTRGV.

A. K-12 Portal

A student/counselor/parent bi-lingual portal should be developed and available for use as a student enters middle school. The UTRGV portal will include a career planning/exploration tool, college portfolio, admissions/document tracking (i.e. application, transcripts, test scores, essays, recommendation letters, extra-curricular activities, community service, etc.) and the ability to create a tuition savings account. Students using the tuition savings account option would be provided with a tuition discount when enrolling at UTRGV.

B. Testing

UTRGV should have state of the art testing centers situated in easily accessible locations near each campus. The centers will offer "on demand" testing in multiple languages for students and the community. Use of "shopping cart" technology will be implemented to provide online test registration & payment, combined with flexible scheduling that offers evening and weekend testing opportunities. Examinees taking tests such as TExES, MCAT and TSI which take 5 or more hours to complete will greatly benefit from facilities that include lounge and kitchen areas to relax and "de-stress" during break periods.

C. Relationship Management & Marketing

UTRGV will need a Customer Relationship Management (CRM) system with tracking, personalized communications, and recruitment funnel management capabilities that will assist a prospective student from the point of entry thru enrollment matriculation.

It is recommended that the EM Division include a dedicated marketing team. This team will focus on the development of bi-lingual marketing and communication material designed to recruit a highly successful national and international student body.

D. Process Automation

The Enrollment Management division will avail itself of the latest technology to implement streamlined and paperless processes that will facilitate the recruitment, admission, financial aid/scholarship awarding, and enrollment of UTRGV students. This would allow for cost efficiency maximization and provide immediate service to students. Key processes that will be addressed include the following:

- Online services and forms for external and internal constituents would be provided through customized web applications and supported with robust automated processes such as:
  - Universal scholarship application, transcript submission, residency documentation, major changes, grade changes, substitutions/waivers, contact information update, financial aid verification documents, etc.
- Student driven online document upload and imaging processes
- Online status tracking for Recruitment, Admissions, Financial Aid, Registrar, and Billing
- Electronic transcript load and transfer evaluation processes
- Availability of pre-transfer course equivalency guide
- Implementation of "recommendation engines" that utilize mining of student data to offer suggestions of suitable scholarship opportunities, course enrollments, communications to prospects, etc.

III.   The Debt-Free Degree

UTRGV has a strong commitment to graduating students with little or no debt. The Debt-free Degree program will focus on low and middle income students. We will seek to eliminate or significantly reduce the accumulation of debt by reducing the reliance on student loans. This will be accomplished by implementing the following:

- Student Money Management Center (SMMC)
- School district curriculum partnership program
- Default Prevention Plan

A. Student Money Management Center (SMMC)

All first time UTRGV students will be required to establish a personal education plan that factors in career path assessment and potential income. A close tie between the intended career path and cost of attendance would be addressed through financial literacy initiatives. In addition, the center will provide students the basics on how to manage financial resources by focusing on budgeting, borrowing, and repayment.

B. School District Curriculum Partnership Program

A school district curriculum partnership program will be designed to allow students with prior college hours to receive an undergraduate degree in 2-3 years. Decreasing time to degree will result in the elimination or reduction of college loans. Skills testing and focused advising will play a prominent role in this endeavor.

C. Default Management Plan

The development of a strong default management plan for UTRGV is critical. In order to have a default rate that carries no restrictions, the UTRGV cohort default rate (CDR) must be below 15%. When the two universities merge, the default portfolio of both institutions will be combined. National, State, UTPA, and UTB current default rates are shown below.

Cohort Default Rate	2010
UTPA	15.5
UTB	17.8
National	14.7
Public 4-year Universities – National	9.3
Texas	17.3

A default management plan for the new university should be developed rapidly in order to positively impact rising CDRs as soon as possible. The plan will include the use full service third party management providers. These providers offer borrowers a variety of tools and counseling services to manage their debt responsibly. Use of these providers would not only prove beneficial for students but would also serve to lower the University's default rate.

IV.   The Global Initiative

The Global Initiative for UTRGV will be to expand its international student initiative by increasing the number and diversity of international students at UTRGV for both undergraduate and graduate degree programs. Most importantly, UTRGV will work collaboratively with faculty and student service units across the university to ensure programs and services support international student success.

UTRGV will reach out to the global community by creating multi-language websites in conjunction with dedicated international recruiters to attract and recruit highly qualified international students from a geographically-diverse range of countries. The utilization of international recruitment companies and multi-language eRecruitment initiatives will strengthen our presence in international markets and address barriers to entry for international students, paying special attention to improving and expanding services critical to international student success at UTRGV. The creation of physical and virtual community centers with social and educational programming will be created to strengthen engagement, build relationships, and increase success of our international student population.

UTRGV will partner with institutions in other countries by offering joint admission and articulation agreements to streamline processes and accelerate degree completion. The university will collaborate closely with international organizations to promote UTRGV as a destination of choice for international students and identify international student financial assistance programs to assist international students enrolling at UTRGV.

V.   La Promesa: Our 4-year Pledge

We are committed to graduating UTRGV students in 4 years. This ambitious goal will be achieved by implementing student centric policies and programs that provide access and support throughout their undergraduate career. The following policies and programs are recommended:

- Holistic Admission Standards
- Comprehensive Orientation Program
- Student Service Centers
- Business Intelligence Technology
- Graduation Achievement Office

A. Admission Standards

Admission standards will be transparent and clearly defined. Through a holistic approach, the reliance on test scores will be eliminated and/or minimized allowing UTRGV to attract a diverse, talented and successful freshman class. For example, many have found high school classroom performance to be a markedly superior way of forecasting academic success in college. Our own research shows that students with prior college hours are significantly more successful than students without prior college hours.

Beyond first-time in college, there are many student populations impacted by admission requirements. Therefore, we recommend the development of policies for the following groups:

Transfer	Concurrent Enrollment
Online	Dual Enrollment
International	Homeschooled
Students with Talent	Transient
Adult Learner/Non-Traditional	Post Baccalaureate
Veterans	Second Degree Seeking
Returning	

B. Orientation

Orientation programs build the foundation for incoming students. Our plan is to include a comprehensive online orientation program bolstered by an innovative onsite program that maximizes student engagement. Orientation programs will be designed to extend beyond the usual 1-2 day experience and continue to involve new students throughout their first year. Orientations will be uniquely tailored to meet the needs of the various populations and to strengthen their connection to UTRGV.

C. Student Service Centers

Physical and virtual bi-lingual student centers will be created to provide seamless, convenient, accessible and personalized service at multiple "one stop" locations. The implementation of virtual student centers will provide staff more time to address students needing individual attention and increases service capacity.

The service centers will be staffed with front line teams of Generalists and Specialists that are highly cross-trained in Admissions, Financial Aid/Scholarships, Registrar, and Billing procedures. Regional service centers will also be located strategically throughout the Rio Grande Valley. In addition, each campus should have a Visitor's Center to meet and greet visitors, offer information on campus events, and provide tour services.

D. Business Intelligence Technology

Business intelligence technology will be used to track performance model data, provide dashboard metrics, and identify clear student degree pathways. This data will be used to collaborate with other divisions to project enrollment, eliminate barriers, and accelerate time to degree.

E. Graduation Achievement Office

The establishment of a Graduation Achievement Office (GAO) will assist Juniors and Seniors on their path to completion. This office will take a proactive approach in monitoring data and communicating with students so that they stay on track to their intended graduation. Automatic alerts and triggers will guarantee constant communication between faculty, students, and the GAO. This will allow for faculty and staff to build strong relationships outside of the classroom and ensure that students reach their academic goals.

VI.   Enrollment Services Functions

To achieve a high level of organizational efficiency, staff productivity and quality of student services, UTRGV must centralize "back office" processes. For example, financial aid awarding should occur in one location. The table below identifies major Enrollment Services processes that need to be identified as centralized or decentralized.

Enrollment Services Functions	PROCESS
Admissions	Application Processing
	Transcript Evaluation
	Admission Decisions
	Letter Generation/Mailing
	Document Collection & Imaging
	Residency Determination
	Orientation
Enrollment Management/Business Intelligence	Reporting/Analysis
	Dataloads
	Job submission & production scheduling
	Business Process Review
	Student Service Centers (includes Call Centers)
Financial Aid	Cost of Attendance Determination
	Aid packaging and awards
	Verification
	Document Collection/Imaging
	Student Money Management Center
	Electronic Disbursements
	Return of Title IV
	SAP processing
	Program Budgeting (i.e. use of set asides)
	Program Reporting & Processing (i.e. Tx Grants, Pell Grant, etc)
	Letter Generation/Mailing
Recruitment	All CRM Processes
	Event Planning
	Recruiter Assignments
	Marketing
	Outreach Services
Registrar	Document Collection & Imaging
	Class/Room Scheduling
	Grade Processing and Academic Standing
	NCAA Certification
	Graduation Certification
	Registration
	Commencement Planning & Ceremony
	Degree Audit
	Letter Generation/Mailing
Scholarships	Scholarship Application
	Scholarship Processing, Review, & Awarding
Testing	Test registration and payment
	Testing Services
Veterans	VA Certification
	VA Student Center

The completion of this report would not have been possible without the contribution of the working group and subgroup members. Please refer to Appendix "C" for complete copies of each subgroup report.

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Appendix A – Working Group Members

Enrollment Management Working Group			
Last Name	**First Name**	**Campus**	**Department**
De La Riva	Yolanda	UTB	Accounting & Finance
Gilchrist	Debbie	UTPA	Admissions & New Student Services
Hinojosa *	Maggie	UTPA	Enrollment Services
Hodgson *	Nikkie	UTB	Enrollment Management
Huber	Tim	UTPA	Faculty
Lopez	Samantha	UTB	Global Engagement
Olague	Heather	UTB	Student Affairs
Rivera	Elaine	UTPA	Student Financial Services
Shannon	Kelly	UTPA	Enrollment Services
Tamayo	Carlo	UTB	Admissions
			*Co-chair

Appendix B – Task List

TASKS	DEPARTMENT	START DATE	END DATE
New University Name	UT System	9/30/2013	12/1/2013
Student Information System Decision	UT System	9/30/2013	10/30/2013
Communication Relationship Mgmt Decision	UT System	2/1/2014	3/1/2014
DUNS #	OIRE	8/1/2014	12/1/2014
OPEID/FICE Code (Application Cycle 8/1/14 & UTRGV Code 7/1/2015)	Financial Aid	8/1/2014	7/1/2015
ACT Code	Admissions	3/1/2014	5/1/2014
ETS/SAT/ATP Code	Testing Services	3/1/2014	5/1/2014
Budgets			
Academic Term Calendar	Enrollment Svcs	2/1/2014	5/1/2014
Admissions	Enrollment Svcs	3/1/2014	8/1/2014
Processing Decisions	Enrollment Svcs	3/1/2014	5/1/2014
Staff Training	Admissions	5/1/2014	7/1/2014
Concurrent Enrollment MOUs	Admissions	9/1/2014	3/1/2015
Admissions Application (EF/Transfer/Int'l/Returning)	Admissions	5/1/2014	8/1/2014
Apply Texas Setup	Admissions	3/1/2014	5/1/2014
Degree Programs (College, Dept, Degree, Major)		3/1/2014	6/1/2014
Admission Requirements	Admissions	3/1/2014	5/1/2014
Admission Requirements to Board of Regents for approval	Admissions	5/1/2013	6/1/2013
Admission Deadlines	Admissions	3/1/2014	5/1/2014
Vendor Agreements	Admissions	3/1/2014	5/1/2014
Communication - Admissions	Admissions	6/1/2014	8/1/2014
Acknowledgements	Admissions	6/1/2014	7/1/2014
Missing Information	Admissions	6/1/2014	7/1/2014
Decisions	Admissions	6/1/2014	7/1/2014
Recruitment	Recruitment	4/1/2014	8/1/2014
Calendar of Events	Recruitment	4/1/2014	7/1/2014
Staffing Assignments/Recruitment Territories	Recruitment	4/1/2014	7/1/2014
Staff Training	Recruitment	5/1/2014	7/1/2014
Contracts	Recruitment	5/1/2014	7/1/2014
Communication - Recruitment	Recruitment	6/1/2014	8/1/2014
Marketing Pieces	Recruitment	6/1/2014	8/1/2014
Purchase List Requirements	Recruitment	6/1/2014	9/1/2014
Presentations	Recruitment	6/1/2014	7/1/2014
Prospect Communication Flows	Recruitment	6/1/2014	9/1/2014
Orientation	Admissions	9/1/2014	1/1/2015

Student Information System Requirements	Enrollment Svcs	2/1/2014	9/1/2015
Term Calendar	Enrollment Svcs	2/1/2014	5/1/2014
Table Setups (Recruitment & Admissions)	UT System	3/1/2014	8/1/2014
Table Setups (All others)	UT System	3/1/2014	11/1/2014
User Access	Enrollment Svcs	3/1/2014	4/1/2014
User Training	Enrollment Svcs	3/1/2014	8/1/2014
Student ID/Logon	Enrollment Svcs	5/1/2014	8/1/2014
Student Data Migration	Enrollment Svcs	3/1/2014	5/1/2014
Course Data Migration	Enrollment Svcs	5/1/2014	3/1/2015
Data Loads	Enrollment Svcs	5/1/2014	8/1/2014
Data Analysis	Enrollment Svcs	5/1/2014	8/1/2014
Enrollment Services Websites and UTRGV student portal	IT	3/1/2014	8/1/2014
Network Domain & File Shares	IT		7/1/2015
Decision regarding 3rd party applications (i.e. Degree Works, Ad Astra, Platinum Analytics, etc.)	Enrollment Svcs	1/15/2015	3/1/2015
Cross Campus Communications			
Financial Aid	Financial Aid	5/1/2014	7/1/2015
Regulatory Release	Financial Aid	12/1/2014	2/1/2015
Title IV Certification Application	Financial Aid	8/1/2014	7/1/2015
QA School	Financial Aid	8/1/2014	11/1/2014
Processing/Policies - Financial Aid	Financial Aid	5/1/2014	7/1/2015
Packaging	Financial Aid	5/1/2014	12/15/2014
FA Set Asides	Financial Aid	5/1/2014	8/1/2014
Institutional Aid Programs	Financial Aid	5/1/2014	8/1/2014
Satisfactory Academic Progress	Financial Aid	7/1/2014	12/1/2014
Financial Aid Priority Deadline	Financial Aid	5/1/2014	6/1/2014
Attendance Monitoring	Financial Aid	8/1/2014	4/1/2015
Web applications	Financial Aid	8/1/2014	9/1/2014
Verification	Financial Aid	7/1/2014	11/1/2014
Cost of Attendance budgets	Financial Aid	12/1/2014	2/1/2015
Professional Judgment	Financial Aid	10/1/2014	12/1/2014
State Programs	Financial Aid	8/1/2014	12/1/2014
Pell LEUs, repeat courses	Financial Aid	7/1/2014	12/1/2014
Work-study	Financial Aid	7/1/2014	12/1/2014
Off-campus agency contracts	Financial Aid	12/1/2014	6/1/2015
Scholarship application & awarding process	Financial Aid	5/1/2014	8/1/2014
NCAA Athletic Scholarships	Financial Aid	5/1/2014	11/1/2014
TEACH Grants	Financial Aid	10/1/2014	2/1/2015
Default Management	Financial Aid	5/1/2014	9/1/2015
Preferred Lender Agreements	Financial Aid	8/1/2014	2/1/2015
Clearinghouse enrollment reporting	Financial Aid	1/1/2015	5/1/2015

Processes for online academic programs	Financial Aid	8/1/2014	11/1/2014
Document Imaging and Storage	Financial Aid	6/1/2014	2/1/2015
Hazlewood - State Military Educational Benefit (TVC)	Financial Aid	1/1/2015	7/1/2015
Fiscal Operations Report (FISAP)	Financial Aid	7/1/2015	8/1/2014
Communication - Financial Aid	Financial Aid	5/1/2014	7/1/2015
AskRio	Financial Aid	5/1/2014	11/1/2014
Marketing materials, plans	Financial Aid	5/1/2014	7/1/2015
EF award letters	Financial Aid	8/1/2014	3/1/2015
Scholarship award letters	Financial Aid	8/1/2014	2/1/2015
Missing Information Letters	Financial Aid	8/1/2014	2/1/2015
Returning student award letters	Financial Aid	1/1/2015	6/1/2015
Consumer Information & Disclosures	Financial Aid	1/1/2015	6/1/2015
Organizational - Financial Aid	Financial Aid	5/1/2014	7/1/2015
Office structure	Financial Aid	5/1/2014	9/1/2014
Process mapping	Financial Aid	5/1/2014	12/1/2014
Staffing	Financial Aid	5/1/2014	2/1/2015
Scholarships - Financial Aid	Financial Aid	5/1/2014	7/1/2015
Scholarships Donors	Financial Aid	5/1/2014	10/1/2014
Institutional scholarship criteria	Financial Aid	5/1/2014	8/1/2014
Scholarship Allocation	Financial Aid	5/1/2014	8/1/2014
Scholarship Compliance Monitoring	Financial Aid	7/1/2014	12/1/2014
Policies - Registrar	Registrar	2/1/2014	8/31/2015
Grading	Registrar	2/1/2014	7/31/2015
Probation & Suspension	Registrar	2/1/2014	8/31/2015
Appeals	Registrar	2/1/2014	8/31/2015
Course	Registrar	2/1/2014	11/1/2014
Drop, Withdrawal, Refunds	Registrar	2/1/2014	2/28/2015
Degree checkout	Registrar	2/1/2014	8/31/2015
TSI	Academic Affairs	5/1/2014	2/28/2015
Information Request	Registrar	5/1/2014	8/1/2015
Bacterial Meningitis	Registrar/Adm	5/1/2014	8/1/2014
Degree Program Requirements	Registrar	6/1/2014	12/1/2014
Catalog	Registrar	6/1/2014	12/1/2014
Transcript processes/paper	Registrar	6/1/2014	7/31/2015
Registration	Registrar	6/1/2014	2/1/2015
Course schedule	Registrar	6/1/2014	12/1/2014
Classrooms	Registrar	6/1/2014	12/1/2014
Records Retention	Registrar	6/1/2014	7/1/2015
Commencement/Graduation	Registrar	6/1/2014	5/1/2015
Athletic Certification	Registrar	6/1/2014	9/1/2015

Appendix C – Subgroup Reports (Enrollment Services)

Working Group	Enrollment Management Subgroup
Co-leads	Dr. Magdalena Hinojosa, Dr. Maria N. Hodgson
Date Submitted	1/6/2014

Subject Area(s) of the Working Group
Enrollment Management

Executive Summary and Introduction

The charge of the Enrollment Management (EM) Working Group is to design an operational model for enrollment management at the New University that maximizes the use of technology, information analysis and innovative processes to reach, educate and galvanize the people of South Texas and our global neighbors.

The Enrollment Management model will be designed to revolutionize the delivery of higher education services by adhering to the guiding principles below:

- Utilizing technology to implement dynamic, interactive, multi-lingual communications and paperless processes
- Creating service solutions versus service rules
- Providing for data informed planning and decision making
- Developing processes that empower students to persist, achieve and create lifelong connections with the University

Implementation of these principles will enable the New University to become one of the largest and most successful Hispanic-serving institutions in the U.S.A.

Discussion

The Enrollment Management subgroup was comprised of the following individuals:

Enrollment Management Subgroup			
Last Name	**First Name**	**Campus**	**Department**
De La Riva	Yolanda	UTB	Accounting & Finance
Hinojosa	Maggie	UTPA	Enrollment Services
Hodgson	Nikkie	UTB	Enrollment Management
Shannon	Kelly	UTPA	Enrollment Services

The EM subgroup reviewed Enrollment Management models and practices at over sixty public and private institutions of higher education across the nation. Institutions reviewed were selected based a number of factors, to include some of the following:

1. UT component schools, schools that recently merged, and system schools in other states
2. Schools of similar size (based on Fall 12 IPEDS data)
3. Schools with predominately underrepresented minority students
4. High Rankings in The Princeton Review for best run colleges, happiest students and best financial aid packaging
5. Schools using PeopleSoft Campus Solutions for their Student Information Systems
6. Schools with Enrollment Management organizational charts readily available on their websites
7. Institutions recognized by the American Association of State Colleges and Universities and/or The Education Trust for innovative strategies/programs for increasing retention and graduation
8. Institutions that have either significantly increased or have significantly higher retention and graduation rates than UTPA and UTB rates.

In reviewing the institutions selected, it was found that Enrollment Management philosophies and organizations vary widely across the United States, however, four common themes permeated throughout the institutions reviewed.

1. Using of data collection and analysis to project enrollments and provide the university with the ability to make data informed decisions.
2. Administering the functions of recruiting, admitting, awarding, enrolling, retaining and graduating a student body that coincides with institutional goals and objectives.
3. Creating an organizational structure that breaks down departmental silos and is sensitive to the needs of our students.
4. Automating communication and process flows.

Critical Startup Elements:

- Academic Term Calendar
- Training plan, training and setup of Student Information System

- Training plan, training for reporting tools
- Data migration decisions/mapping documents
- Decisions on software applications (i.e. Degree Works, Platinum Analytics, CRM, reporting tools, data warehouse, etc.)

Recommendations

Recommendation #1: Enrollment Management Organizational Structure

In order to ensure the best possible services are provided to students, it is critical to break down silos and ensure that service orientated offices are work collaboratively in an integrated fashion to implement clear and transparent processes. Based on best practices from the institutions reviewed, the EM subgroup believes this can best be accomplished by uniting the following offices to create a division of Enrollment Services:

- Admissions
- Business Intelligence
- Call Centers
- Enrollment Service Centers (which includes payment, emergency loan and high assurance verification functionality)
- Financial Assistance/Scholarships
- Marketing
- Orientation
- Recruitment
- Registrar
- Testing
- Veterans Services

Because data analysis is an integral part of Enrollment Services, we are uniquely positioned to make recommendations on issues such as course availability, room utilization and at risk populations.   This requires constant collaboration with other divisions and necessitates that the administrative structure is equal to that of other divisions. For that reason we also recommend that the ES has its own Vice President that reports directly to the President.

Recommendation #2: Debt-Free Degree

Create a Debt-Free Degree program for low-income students who are seeking their first baccalaureate degree. The program would contain 3 primary components:

- Automatic application process when student is admitted to the University and submits a FAFSA

- A financial aid packages that meets 100% of the unmet need without resorting to loans. Financial Aid packages would consist primarily of scholarships, grants and work-study; remaining unmet need would be covered by institutional funds
- An academic/success component that includes course completion/GPA requirements, participation in a defined number of campus and/or online events each semester which may include options such as Financial Literacy workshops, Career Services workshops, Tutoring, Mentoring, etc.

Recommendation #3: Graduation Achievement Office

Create a Graduation Achievement Office to assist seniors with issues that may prevent timely graduation. This office would take a proactive approach to identify seniors that need attention before the student is even aware that they need help. The office would be responsible for the following:

- Extract and analyze data to identify and monitor senior enrollment, waitlists, risk factors and course needs to ensure that seniors stay on track for their intended graduation
- Collaborate with Undergraduate Studies regarding course availability issues
- Ensure rising seniors have realistic graduation plans
- Work with students accumulating too many unusable hours to find alternative programs of study that allow them to graduate before reaching Excess Hour limits
- Pre-graduation checks

Recommendation #4: Using Business Analytics to Improve Retention and Graduation

Use data warehousing and business intelligence technology to equip the campus with the data needed to support student success and time to graduation. This would include items such as:

- Comprehensive tracking component that incorporates Noel-Levitz Student Retention Performance model data and other factors that can be influenced by institutional policy or practice
- Includes automatic alerts and triggers to initiate contact with a student by an appropriate UT-RGV faculty or staff member
- Dashboards with metrics and simple query tools/reports for UT-RGV employees
- Analysis of student course pathways to degree in order to identify and remove roadblocks to graduation (i.e. excessive credit requirements, course availability, etc.)

Recommendation #5: Process Improvement and Automation

The EM subgroup has identified a number of ways to improve services to students and improve efficiency by automating processes. These include the following:

1. Paperless campus – both campuses use Apply Texas, EDI/Speede for transcripts and award online, but more needs to be done to become truly "paperless." Due to limited space, UTB was forced to eliminate file cabinets and image all documents (using Image Now). UTPA also utilizes imaging technology but still accepts paper for some documents. To implement a true paperless UTRGV, the subgroup recommends the following:
    a. 90% documents to be submitted electronically
    b. efficient process to index imaged documents
    c. secure method for students to upload documents (online or kiosks; pre-selected values, student selects and scans)
    d. automated workflow processes to route electronic documents appropriately
2. Centralized processing
    a. All the detail processing for the "back office" people would be in one centralized location
3. Use of mobile apps
    a. Students do not want to wait in line, so we want our staff to go to students (i.e. using tablets to help students register and pay)
    b. Email statements/receipts when a transaction is completed
4. Strategic awarding of Financial Aid
    a. Use funds based on the type of class we are trying to bring in
    b. Centralized scholarship processing
    c. Merit based scholarships in addition to need based
5. Utilize technology to enhance strategic enrollment management
    a. create an EM model that includes class scheduling analysis (i.e. UTPA is currently using Platinum Analytics and Degree Works)
    b. project enrollments
    c. dashboard metrics and data warehousing for trend analysis
6. Implementation of a robust Customer Relationship Management solution such as Talisma or Parateur
    a. Dynamic and interactive, offering "amazon.com" type instant responses
    b. Texting capabilities
    c. Ability to keep prospect and applicant pool out of the student system until the admit stage
    d. Ability to store interactions and communications with prospects/applicants
    e. Source code tracking and funnel status
    f. Event reservation and tracking capabilities

Appendix C – Subgroup Reports (Admissions & Recruitment)

Working Group	Admissions and Recruitment
Co-leads	Carlo Tamayo and Deborah Gilchrist
Date Submitted	1/3/13

Subject Area(s) of the Working Group
Admissions, Recruitment, Orientation

Executive Summary and Introduction

In October of 2013, the Admissions and Recruitment Working Subgroup of Enrollment Management was charged with researching and recommending improved and innovative approaches to the delivery of student services specific to new students. The University of Texas System provided "Guiding Principles" to serve as a compass to direct the planning and design of services, curriculum and programs for the new university.

The University of Texas Rio Grande Valley is strongly committed to promoting access to higher education and building a diverse student body to become one of the nation's largest and most successful Hispanic-serving institutions. Additionally, the institution is dedicated to becoming a global leader in higher education. The areas of Admissions and Recruitment will play a critical role in supporting the mission of UT-RGV and implementation of strategic initiatives, services and activities that will facilitate achievement of institutional goals. As major components of enrollment management, these functional areas must work in close collaboration to attain synergy to maximize the direct impact on shaping the incoming freshman class, student enrollment and ultimately the institutional operational effectiveness and optimization. Through the services offered and activities conducted by admissions and recruitment, initial gateways are created for interactions between prospective students, their influencers and the university. The ability of the institution to communicate and articulate accurate academic expectations and institutional characteristics are mechanisms for affecting positive aspirations for enrollment to the new university and ensuring institutional fit. The subgroup's recommendations are designed to identify, attract and enroll academically qualified students who demonstrate academic promise in achieving success and contribute to creating a diverse campus community.

In order for admissions and student recruitment services to support the realization of the guiding principles, it is vital for these areas to be allocated resources necessary to build an organizational and technological infrastructure that creates the capacity required to achieve success. By calibrating service capacity to correspond to student and institutional demands, the new university will realize healthy yields and conversion rates of new students.

Section I. Discussion

Overall, the working group focused its efforts on developing innovative recommendations closely aligned with the established guiding principles of the new university and that are firmly based on research and analysis of effective practices. Specific areas examined by the group included student recruitment, admissions policies and processes, service centers, orientation and international student recruitment. Throughout its undertaking, the group sought out recommendations that embraced a strong commitment to a student –centered approach, service excellence, and utilization of the newest technology.

While the group developed its recommendations, it also identified several significant issues vital to a successful implementation. The most pressing of these include recruitment materials and communications, admissions policies/standards, setting-up of admissions applications via ApplyTexas, and establishing a student information system to support admissions. The specific "Guiding Principles" addressed by the Admissions and Recruitment Team follow:

- Streamline academic and administrative programs and re-design processes to increase productivity and promote a student-and-service-centered mode of operation.

- Promote access to postsecondary education to a diverse student body to become one of the largest and most successful Hispanic-serving institutions in the U.S.A.

- Fully integrate next generation technology and customized learning to increase affordability and maximize student success.

Section II: Recommendations

E. Implement a One-Stop Student Service Delivery Model

Under the one-stop model, all of a student's business can be completed in a single contact by highly crossed-trained staff, be it face to face, or via phone, fax, Internet or other means. Students provided services through the one-stop model do not have to hunt around, call back, or repeatedly explain their situation when seeking information and assistance with enrolling. One-stop customer service is seamless, convenient, accessible, and personalized. In other words, the key idea behind a one-stop student centers and service delivery model is a comprehensive approach to offering information and assistance that bring services together, both in order to share costs and make it easier for students to access a range of services in one place and one time. The One-Stop concept transcends the bricks and mortar of a physical space; it permeates the service culture of an entire organization and is embraced as a central core value by staff. The three components to an innovative One-Stop Student Delivery Model follow:

1. Virtual: A virtual one-stop offers self-services tools for students that are available 24 hours a day, 7 days a week and are greatly supported by technology. The availability of strategic student self-service options on the university's website allows staff more time to address highly complex student problems and increase service capacity to accommodate projected enrollment growth. In addition to 24X7 interactive, self-service options and student portals that can be customized by the individual student, best practice institutions have moved aggressively to brand their web presence, present a consistent "look and feel", and provide navigational tools from the students' perspective.

2. Physical: Student Services Centers offer one-stop resources to students from highly crossed trained front-line teams of Generalists and Specialists. Students can seek services in person or email and telephone. Student's interactions and transactions may require the intervention of a Generalist. This is a staff person who has a broad knowledge base and can answer a variety of general questions about enrollment processes and possesses specific knowledge in a particular area of expertise; e.g., admissions. In addition, a student's transactions may need to be facilitated by a specialist (the most difficult or a-typical situations). A Specialist has an in-depth understanding of a specific area and the authority to help students work through and resolve complex issues and questions. A call and e-mail center with staff dedicated to responding to telephone calls and e-mails should be included in the Student Services Centers. The Admissions and Recruitment Working Group recommend that Student Service Centers be strategically located across the Rio Grande Valley to serve all prospective students and their families.

3. Centralization: To achieve a high level of organizational efficiency, staff productivity and quality of student services, the new university must streamline data collection and eliminate workflows requiring the re-keying of information, reduce costs of mailing, faxing, filing and document storage while establishing a robust infrastructure necessary to support enrollment growth. The Admissions and Recruitment Working Group recommend the implementation of a central processing center to handle all admission documents. Scanning and retrieval stations should be located at each student service center to enable students to upload their documents. This will facilitate the scanning and indexing of documents remotely and upload them to the central repository without the need for manual mailing or data entry. To support centralization of document storage, all paper forms need to be replaced with online forms. Students should complete all forms online thus the information would automatically be stored in the Student Information System without the need for any manual processes. The admissions process will become a fast and efficient digital workflow using digital documents, digital archives and automation.

F. Visitor's Centers on each campus

In addition to the One Stop Service Centers located strategically throughout the Rio Grande Valley, each campus location should have a Visitor's Center to welcome and direct guests and prospective students. Navigating the many buildings and walkways of a university campus can be frustrating for visitors who are unfamiliar with the layout. Staff and volunteers will meet and greet visitors, offer information on campus events, and provide tour services. According to the Council for the Advancement of Standards in Higher Education, CAS Standards (CAS),"*The common objective of campus information and visitor services (CIVS) is to bring people, programs, and campus services and resources together through increased accessibility to information.*" In order to meet the CAS standards, the CIVS must:

- be readily accessible
- provide a welcoming environment
- emphasize personal communication and interaction
- provide accurate information and referrals

The CAS Standards also state that a CIVS center may include

- Campus orientation and tour programs
- Display and presentation space
- Broadcast and electronic informational resources and support
- Visitor reception space including appropriate support services and facilities adequate in size and scope to meet the volume of inquirers to be assisted.

G. Automate the Transfer Admissions Process

Creating effective pathways for transfer students will be important to UT-RGV. Admissions and recruitment efforts should be tailored to addressing barriers and challenges faced by transfer students transitioning to the institution. The transfer and awarding of credit between dissimilar institutions and curricula is a complex process. Prospective transfer students seek to have their credits, wherever and however attained, recognized by institutions where they enroll for further study. It is important for an institution to develop reasonable and definitive policies and procedures for acceptance of transfer of credits earned at another institution. Because the process is so complex, it is often slow. In addition to reasonable and definitive policies and procedures, the evaluation process must be efficient and accurate. Students expect a quick admission decision. In order to accomplish this level of service, the Admissions and Recruitment Working subgroup recommend the following:

- An electronic transcript load and evaluation process to automate data capture and the course evaluation process.
- An all-inclusive foreign transcript evaluation process.
- A pre-transfer course equivalency guide.
- An automated and user-friendly automated pre-transfer course equivalency guide.

H. Implement a Holistic Admissions Policy

According to information found on the Excelencia in Education website, "Hispanic Serving Institutions (HSI) provided greater access to degree-granting institutions of higher education. In 2011-2012, 62% of HSIs (219) had an open admissions policy, compared to 38% of all degree-granting institutions." To fully support promoting access to higher education among the nation's Hispanic population as well as other underrepresented groups and create a diverse student body, the implementation of a holistic admissions policy is recommended. Indicators of a student's potential for success reach beyond performance on standardized exams. "Traditional verbal and quantitative (often called cognitive) areas typically are not measured by standardized tests. Non-cognitive variables are useful for assessing all students, but they are particularly critical for assessing nontraditional students, since standardized tests and prior grades may afford only a limited view of their potential" (Sedlacek 2004; Lauren, 2008). Non-cognitive attributes that factor as predictors of student success include the following:

- **Positive Self-Concept:** Demonstrates confidence, strength of character, determination, and independence.
- **Realistic Self-Appraisal:** Recognizes and accepts any strengths and deficiencies, especially academic, and works hard at self-development. Recognizes need to broaden individuality.
- **Understands and Knows How to Handle the System:** Exhibits a realistic view of the system based upon personal experiences and is committed to improving the existing system. Takes an assertive approach to dealing with existing wrongs, but is not hostile to society nor is a "cop-out." Involves handling any "isms" (e.g., racism, sexism).
- **Prefers Long-Range to Short-Term or Immediate Needs:** Able to respond to deferred gratification; plans ahead and sets goals.
- **Availability of Strong Support Person:** Seeks and takes advantage of a strong support network or has someone to turn to in a crisis or for encouragement.
- **Successful Leadership Experience:** Demonstrates strong leadership in any area: church, sports, non-educational groups, gang leader, etc.
- **Demonstrated Community Service:** Identifies with a community, is involved in community work.
- **Nontraditional Knowledge Acquired:** Acquires knowledge in a sustained and/or culturally related ways in any area, including social, personal, or interpersonal.

The Admissions and Recruitment Working Group reviewed three admission policy models:
1. Holistic factors with test scores - Even with holistic admissions, colleges will admit just those students who they think have demonstrated the characteristic necessary to succeed academically. At the most selective colleges, admissions officers look for interesting applicants who also have high grades and test scores. At a college with holistic admissions, all of the following are most likely important:

    - A strong academic record with challenging courses.
    - Glowing letters of recommendation.
    - Interesting extracurricular activities.
    - A winning application essay that presents both personality and a sharp mind.

- A strong college interview.

2. Holistic factors without test scores - Some public and private universities have deemphasized SAT and ACT scores and are developing more flexible approaches to admissions in response to changes in the K-12 sector; many have found high school classroom performance to be a markedly superior way of forecasting academic success in college. Lessons learned at the wide range of "test score-optional" schools could be applied to many other institutions. These lessons include:

   - Dropping tests leads to greater diversity because the focus on test scores deters otherwise qualified minority, low-income, first-generation, and female and other students from applying.
   - Deemphasizing tests attracts more students who are academically capable.
   - Tests add little useful information to the high school record: overall, relatively few admissions decisions change with the addition of test scores.
   - High school performance -- expressed either as grades or class rank -- is the best available screening device for applicants.
   - Moving away from tests promotes sounder educational practices in high schools.

3. South and Latin American admissions practices – The top 10 Universities in South and Latin America require entrance exams and some combination of high school performance and recommendations.

The best admissions policies offer the most flexibility and permit applicants to demonstrate their potential in a variety of ways. The Admissions and Recruitment Working Group recommend an admissions policy that considers holistic factors and either minimizes the weight of or eliminates ACT or SAT all together. The following are recommendation options related to the importance factors in determining admissions:
- Very important: High school grade point average, rigor of secondary school record, class rank.
- Important: Prior college hours.
- Other: Standardized test scores, essay, recommendations, character/personal qualities, extracurricular activities, first generation, talent/ability, volunteer work, work experience.

Or

- Very important: High school grade point average, rigor of secondary school record, class rank.
- Important: Prior college hours.
- Other: Essay, recommendations, character/personal qualities, extracurricular activities, first generation, talent/ability, volunteer work, work experience.

In addition, the Admissions and Recruitment Working Group recommend that policies for the following student populations are developed that meet their individual needs:
- New Transfer

- Online
- International
- Adult Learner/Non-Traditional
- Veterans
- Returning
- Concurrent Enrollment
- Dual Enrollment
- Homeschooled
- Transient
- Post Baccalaureate
- Second Degree Seeking

I.   Implement a robust Constituent Relation Management (CRM) system

As the number of students matriculating into college continues to increase each year, the communication aspect of student recruitment is critical to the success of the institution and enhances the experience the student will have once they enroll at our campus. We must implement a CRM that will make it possible to track and manage personalize communications throughout the various stages of the recruitment funnel, from the point of entry as prospective students and on through the progression of application and matriculation. The CRM must be able to handle both domestic and international campaigns. Targeted and accurate communication flows will assist in meeting the enrollment goals of domestic and international students for our new institution. The Admissions and Recruitment Working Group recommend implementing a CRM that meets and possess, but not limited to, the following key attributes: tailored to higher education, scalability, multi-channel, 360 view, analytics, and usability. We should asses CRM's such as Recruiter, Salesforce, Talisma, and others to select the best product that meets the university needs.

J.   Dedicated Marketing Services for Recruitment and Enrollment Services

Developing a dedicated area, either thru the contracting with a private marketing company or an internal Marketing Department for Enrollment Services to focus on the development of the marketing and communication plan and marketing pieces for the recruitment area is crucial. The quality and timeliness of multi-language recruitment marketing pieces will play an integral role in implementing successful marketing campaigns. The university branding, affordability, availability and quality of academic programs and the promotion of student services must be communicated effectively.

K. Establish Regional Centers and/or Regional Recruiters in Strategic Locations

In order to expand our markets, we must establish physical locations and/or hire staff to actively recruit in identified geographic areas of interest. In order to accomplish this we must establish Regional Centers and/or hire Regional recruiters in identified target markets. The placement of Regional Centers and/or regional recruiters should be placed strategically both in-state, out-of-state as well as internationally.

L.   Develop an International Recruitment Plan

In order to begin the international student recruitment process, we must develop an International Recruitment Plan that includes strategies that research shows attracts international students to the U.S. This includes, but not limited to branding, availability of scholarships and programs of study.   Best practices in international recruitment must be incorporated as well which includes the utilization and contracting with international recruitment companies and university centers aboard, attending recruitment fairs across the globe, purchasing international student leads, identifying potential geographical areas of recruitment, have dedicated international recruiters, have in-house international academic advisement counselors and admission counselors. The marketing aspect of the plan must include multi-language marketing strategies. In addition, we must identify and implement services that are unique to this population. International student processes must be incorporated into the One-Stop Student Service Delivery Model discussed above or establish a similar model specifically for international students.

M. Implement an Innovative Orientation Program, Maximizing Student Engagement

Orientation is a vital element for our first year students, our transfer students, and our off-site students. Orientation allows the university to instill school pride, provide an opportunity for students to feel as though they belong to our university family and to introduce them to our services. It is recommended that UT-RGV's orientation program be robust offering to meet the needs of on-campus students as well as off-campus students that goes beyond just a one or two day program.

Our discussion stemmed around three goals that the orientation program should meet. That includes; (1) *acquainting* students with the services and programs offered by the university, (2) *connecting* students to our university by making them feel part of the university family, and (3) *helping* them resolve issues or concerns they have about being an incoming freshmen/transfer student.

Orientation programs build the foundation for the new, incoming students and should be reflective of that in their design. Students should be adequately introduced to campus life in order to make meaningful connections with fellow peers (2008 Student Affairs Leadership Council). With that in mind our sub-working group makes the recommendation for orientation is to include the following:

1. **A Comprehensive Online Orientation Program:** This program would be tailored to meet the different demands of our transfer students, international students, 100% online students, and our first time freshmen.
2. **An Innovative Orientation Program, Maximizing Student Engagement:** Students have yet to commit to attending our campus so we must ensure that our program engages them in the most effective manner to ensure they get both information from the academic side of the university and the student support services.
3. **Engaging Extended Orientation Program:** This can no longer be the orientation of the past that was viewed as a "one and done". The orientation component should be a year-

long process that acquaints the students with the university in multiple ways. We must engage our students early and often.

Section III: Critical Startup Elements

1. Admission requirements
2. Admission deadlines
3. Application fee decisions
4. The scope of services needs to be defined
5. CRM System decision
6. Technology (software and hardware) needs to be purchased and implemented
7. Budget constructed and approved
8. Timeline developed and approved
9. Vendor Contracts approved
10. Approval for the new processes and procedures needs to be obtained
11. Staff needs to be trained on new technology and processes
12. Communication Flows developed
13. Marketing Pieces Designed and printed
14. Development of Recruiting Events Calendar
15. Development of Recruitment Presentations
16. Physical locations need to be identified
17. Orientation fee decisions

Section IV: Conclusion

Using the guiding principles as a guide, the Admissions and Recruitment Working Subgroup respectfully submit these recommendations for consideration. It is the belief of the group that the specific objectives addressed if implemented will result in the following:

- Contribute to efforts that will promote access to postsecondary education to a diverse student body to become one of the nation's largest and most successful Hispanic-serving institutions.
- Improve student satisfaction with enrollment services by creating a more seamless integration of services to students and reconfiguring services from a holistic student perspective (as opposed to an institutional perspective).
- Meet students' expectations regarding the use of newest technology and 24X7 services.

Appendix C – Subgroup Reports (Financial Aid & Scholarships)

Working Group	Financial Aid & Scholarships
Co-leads	Cammy Penrod, Elaine L. Rivera
Date Submitted	1/9/14

Subject Area(s) of the Working Group
Financial Aid, Scholarships

Executive Summary and Introduction

The charge of the Financial Aid & Scholarships subgroup is to recommend a financial aid and scholarships model that complements and integrates with the design of the enrollment management operational model for UTRGV. The financial aid and scholarships model will focus on student-centered streamlined services and processes that maximize the use of technology, efficiency, and innovation with a personalized component to foster student success. This report provides recommendations and background information, as well as identifying significant issues that must be addressed in order to provide financial assistance programs and services to current and prospective students.

Typically there are two most common organizational and reporting models for Financial Aid and Scholarship operations. One is the "enrollment management" model, combining Financial Aid under a dean or vice president of enrollment. The other combines the Financial Aid and Business (student accounts) offices, often under a vice president of finance. The advantage of the enrollment management model is the ability to closely coordinate financial aid into recruitment and retention activities. It is important to note that even under an enrollment management model, close coordination with student account functions is essential for high quality customer service. This report recommends the use of a one-stop service delivery model to assist students with admissions, registration, financial aid, and student account issues. The inclusion of student accounts into the one-stop model is essential to provide seamless service all the way through from admission or enrollment to the payment and disbursement processes.

While the focus of this report are the recommendations for a state of the art financial aid and scholarship operation, many other issues and questions will need to be addressed shortly. For example, decisions about organizational structure, location, staffing, and training must be addressed. Timing decisions such as financial aid application deadlines, award packaging

timeline, and disbursement schedules must be determined. Policy decisions such as use of institutional scholarship and grant funds, professional judgment, satisfactory academic progress, attendance monitoring, quality assurance, and student employment must be finalized. Processing matters such as process mapping, web applications, verification, document imaging and storage must be put in place. Scholarship donors must be contacted in order to finalize criteria for scholarship endowments and funds. Marketing materials and communications to support recruitment and retention and meet compliance requirements must be developed. Default management plans should be developed quickly in order to impact rising cohort default rates as rapidly as possible (the new university will absorb the default portfolios of both UTPA and UTB). A draft timeline of major critical tasks is attached to this report.

Finally, there is a critical issue of great consequence – the OPEID and Title IV certification. Recruitment for the Fall 2015 class begins in early fall of 2014 and returning students need to be informed about which OPEID code to use on the FAFSA starting in January 2015. However, the earliest the new institution could receive Title IV certification and a resulting OPEID code would be around August or September 2015. Title IV certification cannot be granted until the separation of UTB and TSC is complete and the new university is accredited by SACS. Viable options for the financial aid application, awarding and fall 2015 disbursement cycle must be identified quickly. These options will be complex and require technology and system support. A person that can act as the liaison/go-between with the U.S. Department of Education must be identified promptly in order to begin the conversation about how to manage the transition to the new university. The guidance received from U.S. Department of Education will guide decisions which must be made and actions which must be taken in the next few months.

Discussion

The Financial Aid & Scholarships subgroup envisions a one-stop student service delivery model at each campus location of the new university. The service centers would be staffed with fully trained generalists that can assist customers with admissions, financial aid, registration and student billing questions. Financial Aid Advisors would be available to meet one-on-one (in-person, voice, or video) with students that have complex issues. Customers can access the service centers online, in person, via email or telephone. The service center should have robust call center support with a state-of-the art telephone system and service center software to keep track of all customer interactions. Bringing services together under one roof allows for cost efficiencies and makes it easier for customers to access a range of services in one place. The virtual one-stop shop is a critical component, ideally able to handle at least 80% of service center traffic. Students want the convenience of being able to receive services online and via mobile phone. Online financial aid status tracking would be available online, so students could see where they were in the financial aid or scholarship process at any moment in time. Examples of one-stop service centers can be observed at Brigham Young, DePaul, and Widener Universities as well as at Universities of Houston, Alaska Anchorage, Minnesota, and California Santa Cruz.

Financial aid and scholarships processing for all campuses would be centralized in one location to maximize cost efficiencies and provide the fastest results for students waiting to hear about financial aid and scholarship awards. An example of an efficient one-stop service center with a separate processing location and an excellent virtual one-stop shop can be observed at Brigham Young University.

To complement centralized processing, the goal is to provide paperless financial aid and scholarship processes. Online forms & applications would be offered through customized web applications.   Financial aid verification is often a cumbersome document-laden process that causes many delays for students waiting on financial aid awards. Multiple documents must be collected from various sources; and documents are received at different times. The process is difficult for the student and complex for the Financial Aid Office to administer. Making the verification process paperless and automating the steps in the process would yield significant efficiencies, reducing the time to complete the process from several weeks to a few days. Having an online document upload process and a student-driven up-front document imaging process would eliminate paper from the process. Examples of universities with online document upload are University of Phoenix, DePaul University, Brigham Young University, and Washington State University. Additionally the verification process flow could be automated via programming and workflow in the Student Information System. Software that could be used to develop a paperless process has been identified (Docfinity, check uploading processes used by Chase Bank and Bank of America). Programming to automate the verification process flow would have to be developed in the Student Information System. While these processes could be developed in-house with the purchase of additional software, the timeline to bring such processes on line may be longer than what's needed to be ready for Fall 2015 processing. The workgroup has identified three third party servicers that offer a paperless automated verification process (Global FAS, Regent Education, and Financial Aid Services). Verification services offered by third party servicers can be set up and put in operation in a matter of a few weeks. More universities and colleges are using third party servicers for verification, including Dallas County Community College, Collin College, Lone Star College, University of Texas Brownsville, University of Texas Austin, and North Central State in the state of Texas.

Scholarships are another area that can greatly benefit from online and streamlined processes. Students should only have to complete one universal application to apply for any or all university scholarships, and that application should be online. Applying for scholarships can be complex and confusing for students if there are multiple applications a student must submit, each with its own set of requirements. UTPA currently has an online application, but it is not universally used by all departments. The process of reviewing hundreds of scholarship applications can also be cumbersome and time consuming. It is strategically advantageous for a university to send out its scholarship awards early in the recruitment season. For this reason, an online scholarship application review process would offer many advantages. The workgroup has identified universities that have an online scholarship application & review process (University of North Texas, Western Governors University). These universities are using a third party vendor for a scholarship management solution (*Academic Works*). *Academic Works* creates a searchable database of scholarships for students to view. It

automatically matches and applies students to appropriate scholarship opportunities using information gathered from an online scholarship application or data imported from their student record. It then recommends scholarships to students based on their profile to help students find scholarships for which they are suited. Students can be prompted to provide additional information for specific scholarships such as essays or letters of recommendation. It automatically screens students against scholarship requirements using information from their student profiles, aiding in the scholarship review process.

In addition to streamlining the scholarship application and review process, the new university should consider using a centralized scholarship administration approach. Institutional scholarships can play a very important role in building and shaping enrollment if used in a coordinated, strategic approach. Institutional funds are scarce and can be used to best advantage by coordination of awards and avoidance of inefficient duplicative awarding. UTPA has established a Scholarship Office that oversees awarding of institutional scholarships by ensuring that scholarships are awarded on a timely basis to complement the recruitment and retention cycles. Another beneficial approach is to define well ahead of the recruitment cycle the type of programs that will be offered through institutional and set aside funds. Programs that are developed to meet strategic objectives and are promoted early in the recruitment cycle generate interest and excitement for the university.

Student loan debt is increasing, and poses a particular problem for students who take longer than normal to finish or do not finish their academic program. First generation and lower socio economic students are at greater risk as they are not as knowledgeable about managing financial resources and may not be familiar with banking or managing student debt. The establishment of a Student Money Management Center would provide students with little financial knowhow the basics on how to manage financial resources. More universities are establishing Student Money Management Centers. Their focus is on budgeting, borrowing, & repayment.
Examples of universities with such centers are Kansas State University, Ohio State University, Temple University, University of North Texas, and Texas State Technical College Waco. All first time incoming undergraduates should be required to establish a personal education plan that factors in desired major, career choices, and the resources required to develop such a personal education plan. The emphasis should be on minimizing student debt by speedy degree completion and wise budgeting of resources. Many universities are relying on trained peer financial advisors to staff Student Money Management Centers.

There is a growing concern about rising cohort default rates (CDR) nationally and locally. UTPA's latest 3 year CDR is 15.5%, and UT Brownsville's latest 3 year CDR is 17.8%. When the two universities merge, the default portfolio of both institutions will be combined.

Official Three Year CDRs

Cohort Default Rate	2010
UTPA	15.5
UTB	17.8
National	14.7
Public 4-Year Universities - National	9.3
Texas	17.3

In order to have a default rate that carries no restrictions, the new university must have a CDR below 15%. Universities with a CDR below 15% are able to disburse one semester loans in one disbursement and do not have to withhold loan disbursements for new incoming students for 30 days. A default management plan for the new university should be developed rapidly in order to positively impact rising CDRs as soon as possible. This report recommends that consideration be given to the use of full service third party default management providers in order to impact the CDR. Three providers were identified (TG Higher Edge, Ceannate, and SALT). TG Higher Edge provides grace period and delinquent loan counseling services. Ceannate i3 group offers similar services. Ceannate loanlook provides a web portal and mobile app that lets borrowers manage all of their student loans in one easy interface. SALT offers online and mobile loan managements tools, personal counselors, and financial literacy tutorials. A combination of several services could prove to be very beneficial for students and help lower the university's cohort default rate.

Offering high quality, high touch, efficient service requires thorough oversight of quality control, compliance, and training. This is particularly relevant with the establishment of service centers where staff from different departments must be able to complete tasks and actions highly complex in nature and from another area or department. Financial Aid, Admissions, Registrar, and Student Billing all have many state and federal regulations that must be followed, in addition to institutional policies and procedures. This report recommends having a Compliance/Quality Control/Training Officer to oversee these important functions.

Members of the Enrollment Management workgroup interviewed the Director and the Coordinator from Brigham Young University's One-Stop Shop. Their university has a very well designed professional virtual one-stop shop. The online website has professionally produced videos, and a strong social media presence. When BYU originally established the one-stop shop centers, they took staff from the different Enrollment Management offices to form a Communications Department. The department has 6 FTE, including a Project Manager, one video expert, 1 graphic designer, a trainer, and a social media expert. The communications staff prepares marketing materials, and also conducts surveys and focus groups. This report recommends the establishment of a Communications department to serve all Enrollment Management offices and the one-stop shop service centers, including all online, mobile, and social media instances.

Critical Startup Elements

1) OPEID & Title IV certification - A person that can act as the liaison/go-between with the U.S. Department of Education must be identified promptly in order to begin the conversation about acquiring an OPEID for the new university and receiving certification to participate in federal Title IV financial aid programs. Representatives from Middle Georgia State College, the result of two institutions that merged this year, were interviewed. The conversation revolved around the processes used to complete the merger as well as the process to obtain the OPEID and Federal Title IV certification. A complete transcript of the conversation is available, but several critical issues were identified by Georgia college personnel:

It takes at least 6 months to process the Title IV certification application and OPEID for a merger. The application must be initiated no later than early January 2015.

Accreditation and state authorization are required to initiate the Title IV certification application. A letter from SACS indicating temporary accreditation must be obtained by December 2014.

The application requires that one campus be identified as the primary location. That facilitates the processing of financial aid awards under a current existing OPEID number while the institution is waiting for the new Program Participation Agreement (PPA).

The new university must be certified for the fiscal year beginning July 1, 2015 in order to be able to disburse financial aid for Fall 2015.

2) Developing and following a timeline for completion of all tasks – Development of and adherence to a detailed timeline outlining all tasks to be accomplished before start of the Fall 2015 semester is essential for the successful launch of the new university. The timeline must be closely coordinated with other university departments, as many tasks are interdependent.

Conclusion and Recommendations

The Financial Aid/Scholarships subgroup participated in multiple brainstorming discussions, conducted research to identify best practice institutions, and viewed products and services offered by third party vendors to arrive at the following recommendations:

- One-stop service centers at each campus that include admissions, financial aid, registrar, and student billing functions
  - o Fully Cross-trained staff - across all one-stop service center departments
  - o Service Center software to keep track of all student interactions/contacts
  - o Robust call center support with state-of-the-art telephone system
- Centralized financial aid processing in one location
- Virtual One-Stop that handles at least 80% of student traffic. Maximizing self-service options including online status tracking throughout the process
- "Paperless" financial aid processes, including automated paperless verification
- Online forms & applications

- Online document upload and student-driven up-front document imaging process
- Streamlining & automation of processes
- Online scholarship application and review, and "smart" scholarship search engine
- Centralized scholarship administration
- Strategic awarding of institutional and set aside funds
- "Student Money Management Center" – financial literacy center
- Default Management Plan utilizing third party servicers
- Compliance/quality control/training officer
- Dedicated Enrollment Management Communications/Marketing staff

These recommendations are offered as suggestions in order to provide high quality, efficient, prompt, personalized service to students, families, and the community. Many applications could be developed in-house if time were not a constraint. Some recommendations require the use of third party software, product or services in order to offer superior service. A cost/benefit analysis should be conducted to determine which applications provide the highest benefit and greatest cost savings.

Appendix C – Subgroup Reports (International Admissions)

Working Group	Enrollment Management International Student Admissions/SEVIS subgroup
Team Members *Co-leads	*Samantha Lopez ,*Pamela Chapa, Alla Paroiatnikova, Joel Garza, Norma Ramos
Date Submitted	1/20/2012

Subject Area(s) of the Working Group
International Student Admissions/ISSS - SEVIS

Executive Summary and Introduction

In the month of October 2013, the International Student Admissions/Recruitment/SEVIS subgroup of Enrollment Management group was created to research best practices among flagship universities around the nation. Our task is to recommend innovative ideas, processes, and best practices to our international student and scholar services. The University of Texas System provided "Guiding Principles" to serve as a compass to direct the planning and design of services, curriculum, and programs for the new university.

The University of Texas Rio Grande Valley is strongly committed to promoting access to higher education and building a diverse student body to become one of the nation's largest and most successful Hispanic-serving institutions. Additionally, the institution is dedicated to becoming a global leader in higher education.

The areas of International Student Admission and Recruitment and ISSS (International Student and Scholar Services) will play a critical role in supporting the mission of UT-RGV and implementation of strategic initiatives, services and activities to attract many students around the world and to have a campus with students from different cultures, backgrounds and customs. Campus internationalization plays a key role in the goals and objectives of the new UT Rio Grande Valley institution.

The Global Engagement area of the UT-RGV will be committed to:
- Academic excellence and degree completion
- Economic development and world class research
- Accountability and efficiency and leadership in higher education innovation research
- Assess student goals, place a plan and monitor the progression

In order for international student admissions and recruitment/ ISSS to support the realization of the guiding principles, it is vital for these areas to be allocated resources necessary to build an organizational and technological infrastructure that creates the capacity required to achieve success.

Section I. Discussion

Overall, the working group focused its efforts on developing ground-breaking recommendations closely aligned with the established guiding principles of the new university and that are firmly based on research and analysis of effective practices. Specific areas examined by the group included student recruitment, admissions policies and processes, service centers, orientation and international student recruitment. Our recommendations embraced a strong commitment to the international student –centered approach, service excellence, and utilization of the newest technology to better serve them.

While the group developed its recommendations, it also identified several significant issues vital to a successful implementation.

- Streamline academic and administrative programs and re-design processes to increase productivity and promote a student-and-service-centered mode of operation.

- Promote access to postsecondary education to a diverse student body to become one of the largest and most successful Hispanic-serving institutions in the U.S.A.

- Fully integrate next generation technology and customized learning to increase affordability and maximize student success.

Section II: Recommendations

1. Implement a one-Stop Shop student service delivery model for the Global Engagement umbrella.
   The one stop shop will involve an integration process to fix the lack of organization and cooperation between dispersed department or units. This model will dissolve the diversity of procedures, complex bureaucracy, difficulties in communication and decision making.   The implementation will guarantee a first class service to our future students with effective responses provided, procedures concluded, and results achieved.

   a. UT-RGV envisions the Global engagement as a very strong area to support the mission of the new institution. Therefore we recommend that the new President

create a new position for the Vice President for Global Engagement to directly report to him/her. Under this VP, the following areas will fall:

- International Student Admissions and Recruitment (separately from regular admission)
- ISSS, International Student & Scholar Services
- Language Institute, Study Abroad
- Global Initiatives and Partnerships
- Center for Latin American Studies
-

2. Build an International Student Villas (Residence) at UT-RGV.

This will serve as a key to attract more students from other countries where they will find a safe place to live and mingle with other students from around the world. We need to offer this residence to offer food for different student needs depending on their culture, a place to use and present cultural events, and use this international student villa as a tool for student support and retention. This will be a student residence with unique social, cultural, and recreational activities.

The international Student Villas will offer the following:

- Help the students to achieve their academic, personal and leadership goals
- Provide the best possible opportunities for overseas students to experience many facets of the life in Brownsville and a better understanding of our culture.
- Broaden the student's horizons through friendship with people from widely different backgrounds and cultures
- Make an effective contribution to worldwide relations
- Have different cottages , these cottages can be separated by language or by continent
- Facilities to host international student and faculty events
- The residence will provide affordable prices for students
- A cafeteria with a variety of different foods depending on culture and religion
- Computer Room
- Pool
- Small gym
- Offer short and long term accommodation
- Provide cottages for short-term scholars
- Kitchen
- Fully Furnished single and shared rooms
-

A current employee from UTB lived at Brigham Young University at the on-campus Foreign Language Housing Complex. The way the program works is that each

apartment in the building is dedicated to a specific language (some languages had multiple apartments). Inside the apartment, only that language could be spoken. English could be spoken in the complex common areas. Each apartment housed 6 students: one language native and 5 others learning the language. The native, residential facilitator (RF), got free rent in exchange for enforcing the language being spoken in the apartment, tutoring the language as needed, etc. Part of the program also included eating dinners together Sunday-Thursday as a language cohort. Food costs were added to rent and each day there was an X amount of dollars for dinner and people took turns shopping for food and cooking together. This exercise helped build relationships and confidence in the language being learned. Camilla says that the students who lived at the Foreign Language Housing LOVED the environment, and often moved on to a third or fourth language from semester to semester.

Here is the information on the Foreign Language Student Residence at Brigham Young University: http://www.byu.edu/oncampushousing/flsr.shtml Here is the professor that Camilla worked with who was in charge of Portuguese approvals for resident selection in case you'd like to talk to someone about it.

http://humanities.byu.edu/directory/wcf/

3. International Recruiting Strategic tools that we will need to use:
   - Take the Introduction to Armchair International Student Recruitment e-learning workshop from NAFSA [This course is geared toward new international student recruitment and admissions professionals who want an understanding of international student recruitment basics and strategies.]
   - Possible partnership with ELS
   - Attend student fairs around the world to promote the university's brand
   - Develop a strong and effective university promotion focused to parents. Parents seek a combination of academic quality, responsiveness, and safety.
   - Develop strong and have a reliance on social media. The millennial generation seeks access to information at their convenience.
   - Use of an international recruiter company such as Hobsons
   - Recruit strongly in countries where students are fully funded by the government
   - Have 2 recruiters for Mexico, 1 International
   - Have University Centers Abroad
   - Continue to have Student Fairs for our neighbor cities
   - Aggressive recruiting of students in specific target markets
   - Include academic departments and other service departments in recruitment activities
   - Work closely with high schools

4. UT-RGV a "student" focused university.
   Faculty, administrators and staff will provide an optimal learning experience by providing services that will lead the students to success. Students should be the center of our focus.

   UT RGV employees should provide: (all classifications)
   -
   - Instructional experiences and support services that meet the academic, social, and career development needs of our students.
   - An institutional culture promoted by faculty, staff and administrators that engenders a caring a supportive environment. The students are our "Priority".
   - Staff, Administrators and Faculty promotion and pay should be connected with student involvement, community service, international participation and exposure.
   - Activities Include:
     - First two weeks of each fall semester called "Weeks of Welcome"
     - Social activities and educational programs to ease transition and minimize culture shock.
     - Parent association
     - Bi-weekly student events fall and spring semesters
     - Continue to use the Buddy Program

5. Important timelines to issue immigration documents for F and J programs for UT RGV

Dates	Actions
December-13	Initiate Letter to the Department of State for J-1 Program procedures
January-14	Initiate Letter to SEVP-Department of Homeland Security F-1 Program
January-14	Receive Instructions from the Department of State
February-14	Receive Instructions from SEVP- The Department of Homeland Security
Feb-14	Process form DS-3036 For J-1 Program
Feb-14	Pay a designation fee of $3,982.00 at pay.gov
Feb-14 information	Receive all program information for degrees offered. Will also need ELI's
Mar-14	Process I-17 for F-1 Program UT RGV and both ELI's
Mar-14	Pay 1700 .00 for Certification
Mar-14	Pay 655.00 For Site Visit
9-12 months	Designation Approval of the Program
Feb or March 2014	President of new university announced
2014	Implementation of People Soft - HR & Financial Modules

2014-2015	Implementation of People Soft - Review compatibility with SEVIS batch process reg. Student & Academic Module
2014-2015	Accreditation of both English Language Institutes as they are not stand alones
2014-2015	Required by Accreditation Act for ELI
Jan-15	Open registration for UT-RGV through Apply Texas
Feb-15	J-1 Program Designation UT-RGV (This is if it takes a year)
Feb-15	F-1 Program Certification UT-RGV (This is if it takes a year)
June-2015	SACS approves new university
Aug-15	Inaugural class enrolls in new university

6. **Provide cross cultural events**
   UT-RGV will be committed to provide cultural and educational programming activities for all international students and scholars. Many of the programs provided will include US students to allow further cultural exchange outside the classroom. Below is a list of programs provided:

International Orientation Program	August
Welcome Pool Party	August
Coffee and Donuts Fridays	Fall
Trip to San Antonio and Austin to watch the Longhorns game	October
International Education Week	November
Thanksgiving dinner	November
Thanksgiving dinner organized by our Community partners	November
Christmas Dinner with Community partners	December
Trips to South Padre Island	Spring Break, March
International women's Day celebration and reception	March
Community Service	February to April
Travel Around the World Presentations in the community	Fall & Spring
Graduation reception hosted by the Office of Global Eng.	Every semester

7. Offer a bridge program with the English Language Institute as part of admissions on those students that are requiring additional English Language requirements.

Section IV: Conclusion

Using the guiding principles as a guide, the International Student Admissions/SEVIS Working Subgroup respectfully submits these recommendations for consideration. It is the belief of the group that the specific objectives addressed if implemented will result in the following:

* Contribute to efforts that will promote access to postsecondary education to a diverse student body to become one of the nation's largest and most successful Hispanic-serving institutions.
* Improve student satisfaction with enrollment services by creating a more seamless integration of services to our international student and scholars by configuring services from a holistic student perspective (as opposed to an institutional perspective).
* Meet students' expectations regarding the use of newest technology and 24X7 services.
* Being able to maintain the immigration status of our student and scholars to comply with all state and federal entities.
* Being able to provide student abroad opportunities to our US students and to attract interntiaonal students and scholars from all around the world.
* Take great pride in ensuring positive relationships across international institutions, fostering cultural exchanges which are mutually beneficial, while ensuring that rules and regulations surrounding the Exchange Visitor Program are well adhered to.

Appendix C – Subgroup Reports (Registrar)

Working Group	Office of the University Registrar (sub-group to Enrollment Management Working Group)
Co-leads	Jeff Rhodes, Ed.D., University Registrar, UTPA
	Jerry Martinez, Assistant Registrar, UTB
Date Submitted	1/7/13

Subject Area(s) of the Working Group
Records and registration operations

Executive Summary and Introduction

Because the Office of the University Registrar (OUR) is often viewed in clerical terms, with its role misunderstood by the larger campus community, our group believes it prudent and appropriate to begin our work by articulating the core values of the OUR and its role in campus operations. Those values and role are listed below, along with the critical startup elements necessary for us to be ready for the start of classes at UT-RGV in August of 2015. Because the OUR serves in a policy enforcement role, it is imperative that key policy decisions are made in a timely manner, and these decisions belong to the faculty and academic administration of UT-RGV.

Discussion

We have identified the following five core values for the Office of the University Registrar (OUR):
1. Academic integrity
2. An innovative spirit
3. Quality service
4. Compliance with academic and curricular policies
5. Collaboration

The following four statements summarize the role of the Office of the University Registrar:
1. Protect the institution's academic integrity
2. Ensure compliance with academic and curricular policy at the institutional, state, and national levels
3. Facilitate students' successful navigation of the postsecondary landscape
4. Assist faculty members with completion of the intricacies of the collective mission

In order to establish processes that enforce the academic and curricular policies set by the faculty and academic leadership at UT-RGV, the OUR must be cognizant of those policies, including the details that are often left unsaid and the intent of the policy makers. With this information in hand in a timely fashion, we can erect processes that facilitate students'

registration for courses needed for timely degree completion. Typically, registration for a fall semester begins the preceding spring semester when current students are asked to meet with advisors to discuss progress and plan for upcoming coursework. We plan to begin advising and registration in April 2015 for UT-RGV students attending in the fall of 2015. In order to be prepared for advising and registration, we must have the curriculum and course inventory established in time to build the fall 2015 schedule. The building of the fall 2015 schedule needs to occur from December 2014 through February 2015, with administrative review and approval occurring in March 2015 to facilitate advising and registration. This said, it is imperative that the curriculum for the UT-RGV academic programs be determined no later than November 2014. Prior to the determination of curriculum, there are basic academic policies which are required, such as a decision on the academic calendar to be used (semester vs. quarter system), and the course unit to be used (semester credit hour, quarter credit hour, or contact hours). We submit these needs for consideration in order to avoid the assumption of business as usual, moving old habits into the new university. As such, we submit the following list of critical startup elements.

Critical Startup Elements
1. Academic calendar policy – needed by March 2014
2. Course unit policy – needed by March 2014
3. Decision on degree audit tool to be used – needed by March 2014 for implementation
4. Course inventory – needed by August 2014
5. Core curriculum – needed by September 2014
6. Program curricula – needed by September 2014
7. Code degree plans into degree audit system – September through December 2014
8. Course scheduling policy – needed by September 2014
9. Fall 2015 course schedule build – October 2014 through February 2015

Critical Service Items:
- Data migration details
- Archived transcript (UTB & UTPA) storage, retrieval, and dissemination
- Third party software solutions to be kept or discarded (DegreeWorks, Astra Schedule, Platinum Analytics, etc.)
- Data feeds to third party software retained
- PeopleSoft Campus Solutions implementation timeline and training details
- Enrollment reporting (state, federal, and Clearinghouse)
- Distance education terms (Academic Partnerships)
- UTRGV transcripts – dissemination system
- Curriculum – grandfather current students or require adherence to new UTRGV program requirements?

Conclusion and Recommendations
In order to serve a student body dispersed over three counties and multiple municipalities, services must be delivered primarily online, with limited need for face-to-face appearance by the students in order to be assisted. Functionality envisioned for our department includes

- Online document upload, allowing students to upload documents for appeals, verification of vaccination, and requests for updates to residency, supported by a robust workflow that attaches the document to the student's record and routes the requests for administrative action.
- Email (to faculty) and text (to students) notification of changes to schedules, grades, names, and other portions of the student record. This functionality has already begun at UTPA and UTB, and the vision is to provide immediate feedback on changes to student records to ensure privacy and accuracy of data.
- Online transcript request and delivery service, eliminating the need for any student, current or former, to appear in person to request a transcript, which will include immediate notification of holds that prevent the release of transcripts.
- Online profile providing students with a snapshot of their academic standing, progress toward degree, TSI status, risk of excess hours and three-peat charges, and six-drop status.
- Online workflow allowing faculty members to change grades and authorize overrides electronically.
- Commencement ticketing using the software available from universitytickets.com, allowing for enforcement of attendance limitations.
- Participation in the proposed one-stop shop to leverage cross-trained team members' contribution and allow OUR team members to focus on more in-depth service needs.
- Maximization of classroom space through the use of Ad Astra's Schedule 7 product and Platinum Analytics to identify course demand.
- Chat functionality to allow students to receive help without having to appear in person at the Office of the University Registrar.
- Online change of major forms that verify data and enter data without the need for staff intervention.
- Degree planning using DegreeWorks, accompanied by functionality that prevents any student from registering for a course that is not on his/her degree plan.
- All registration activity (initial registration, adds and drops, withdrawals) will occur online with proper controls for student-athletes, international students, and those required to be enrolled in developmental courses.
- NCAA eligibility tracking, reporting, and advising system

The Office of the Registrar is most concerned with the prerequisite policy decisions being made in time for us to build processes to enroll students. Furthermore, additional information from UT-System regarding the implementation of Campus Solutions is needed in order to support our planning and allow us to allocate resources to effectively maintain UTB and UTPA operations while building the records and registration infrastructure for UTRGV. Lastly, while an innovative spirit is a core value, our ability to innovate is tempered by the fiscal resources available to us. We continue our research into technology accelerators, but we cannot make any proposals or begin any planning until we have both the budgetary and reporting parameters in place to prioritize and guide our efforts.

Appendix C – Subgroup Reports (Testing)

Working Group	Testing Services Sub-Group
Co-leads	Dr. Mary Hodge and Dr. Patrick McGehee
Date Submitted	01/24/2014

Subject Area(s) of the Working Sub-Group
Testing Services

Executive Summary and Introduction

In order to support the vision and guiding principles of the University of Texas Rio Grande Valley, it is essential for testing services to be allocated resources sufficient to support an organizational and technological infrastructure for state-of-the-art testing centers for the delivery of quality national testing services at both the Edinburg and Brownsville locations. Services currently provided include online (internet-based) testing, exams required for admission to undergraduate and graduate school, placement testing, for-credit exams, national and university standardized tests, professional certifications and various licensure programs, correspondence exams for distance learning programs at other institutions of higher education and traditional paper/pencil tests.

Section I: Discussion

The working group discussions centered on developing innovative recommendations aligned with NCTA (National College Testing Association) professional standards and guidelines, as well as, the University of Texas Rio Grande Valley guiding principles. Specific areas researched by the group included on-demand testing, automated payment process, dual language testing, optimum testing environment, dedicated technology staff, test centers at each site, and technological infrastructure. Innovations considered focused on improving/modernizing services offered to students.

Section II: Recommendations

N. On-Demand Testing

It is recommended that both testing sites institute "on-demand" testing allowing examinees to test on a walk-in basis with on-site registration. On-demand testing can only be available to examinees if both sites are equipped with (1) an expanded work force, (2) updating of existing computers, (3) an additional large testing lab equipped with new computers and furniture, and (4) the expansion of existing testing sites. For both examinees and advising entities, an internet accessible web cam showing the current waiting line for on-demand testing is highly recommended, allowing gauging of testing opportunities.

O. Automate Payment Process

Online registration and payment facilitates the registration and payment process for students/examinees to easily register and pay from a convenient location convenient at any time. Not only is online payment more secure than accepting cash, it is time saving as daily deposits at the Bursar's office are not necessary. The findings of the 2011 UTPA internal audit mandated that the UTPA testing center stop accepting cash payments, thus forcing the move to electronic payments to meet security and compliance requirements. Online registration provides examinees with the ability to reserve a seat instantly and have a confirmation that his/her seat is reserved. Thus, the risk to the student of going standby has been minimized. Students have complete control of the registration process when they are able to select a date and time convenient for them.

P. Implement Dual Language Testing

As the University of Texas Rio Grande Valley will be a bicultural, bi-lingual, and bi-literate institution, testing in both English and Spanish must be provided, if available. Second language testing would serve an array of purposes: satisfy general education requirements, international global awareness requirements, second language requirements, or certification requirements. Exams can also be useful for placement purposes to determine enrollment in upper level courses and to formulate a plan of study that is best suited for a students' needs and career goals. Dual language exams will necessitate the employment of dual language proficient staff.

Q. Implement an Optimum Testing Environment for Examinees

The quality of test sites varies dramatically, a factor that can have an impact on test day performance. Major factors that affect the testing environment include outside noise, room temperature and proctor behavior. All of these distract students from being able to focus 100% on exams for which they've spent months or years preparing. Sound-proofing all testing labs and access to thermostats to adjust temperature as needed will greatly reduce the effect of the environment on testing outcomes and allow examinees to perform at their personal best. Additionally, regularly scheduled periodic training of testing staff on the latest advances in testing procedures and requirements will ensure successful testing experiences for all examinees. The latest in test center psychology has prompted test centers to add amenities such as stress-relievers, television/VCR, and lounge and kitchen areas in which examines can relax during test breaks. Five hour exams, such as the TExES and MCAT, and the new unlimited time TSI Assessment necessitate multiple break periods for examinees.

R. Dedicated Technical Support Staff

As paper/pencil exams become obsolete, delivery of secure, computer-based exams requires technological expertise to maintain computer systems, servers and networks for the on-time delivery of internet-based exams, as required by national testing companies. To resolve frequent problems that halt computer-based testing, on-site staff must include at least one full-time staff member to address the areas of:
1. Server connections and communications
2. Troubleshooting network connections
3. Installation and maintenance of security cameras

4. Technical support for daily problems
5. Online registration and payment website
6. Interpretation of technical terms and company technical manuals
7. To act as a consultant in providing student support online
8. Company software/platform upgrades call for technical on-site support (CLEP)
9. Ensuring that technology hardware and software continues to meet testing company requirements

S. Test Centers at Each Site with Campus Shuttle Service

The Testing Centers at both UT Brownsville and UT-Pan American must continue serving the assessment needs of all students and community members in each geographical area. It is unrealistic to ask students from Brownsville to travel to Edinburg for testing and vice versa, as it would cause an undue burden on students. If the UT-Pan American/Edinburg testing site were to close, students would most likely go to South Texas College for their testing needs, rather than UT Brownsville, which would result in lost revenue for the University of Texas Rio Grande Valley. Likewise, students in Brownsville would most likely test in Brownsville or Harlingen, rather than travel to Edinburg or a central mid-valley location. As both testing centers are in off-campus locations, shuttle service from the main campuses to the test centers is necessary to avoid an additional barrier for students.

T. Technological Infrastructure (Physical Hardware)

It is imperative that both testing centers be allocated resources necessary to construct and maintain the technological infrastructure that supports the current and future volume of testing conducted at both locations. The testing volume is expected to be 22,000 exams delivered during the 2013-2014 academic year and will increase proportionally with the predicted student body expansion. Test center infrastructure includes: data centers, computers, computer networks, database management devices, telephone and DSL lines, routers, and everything that supports the flow and processing of information. The testing center infrastructure is crucial to where and how testing data is made accessible interdepartmentally, how much information can be carried and how quickly, especially in the delivery of examinations to students.

Section III: Critical Startup Elements

1. Institutional funding
2. Two fully-equipped and fully-functioning test centers (in Brownsville and Edinburg) inspected and approved by national testing companies by Spring 2015
3. Integrated system to enable access to student test scores from both testing sites and to provide them to the registrar's office, advisement, admissions and new student recruitment
4. Technological infrastructure requirements in line with national testing companies specifications by Spring 2015
5. Online payment and registration system tested and fully-functional by Spring 2015
6. Increased and fully-trained testing staff
7. Dedicated technical support staff at each testing center

Section IV: Conclusion

With the guiding principle of creating an innovative institution with exceptional service for students, the Testing Services Sub-Group submits these recommendations for consideration. Drs. Hodge and McGehee agree that the above listed factors will provide the University of Texas Rio Grande Valley with testing services that will serve its students based on the best-practices and theories in the field, within the framework of national testing company specifications.