

August 24, 2001

MEMORANDUM

To: Gerald E. Lang
Provost and Vice President for Academic Affairs and Research

Kenneth D. Gray
Vice President for Student Affairs

Scott Kelley
Vice President for Administration, Finance and Human Resources

From: Russell K. Dean
Associate Provost

Narvel Weese
Assistant Vice President for Planning

Amir Mohammadi
Associate Vice President for Student Affairs

Subject: Establishment of an Enrollment Management Council

In the fall of 1999 Provost Lang appointed the Student Financial Support Executive Committee with the following charge:

To establish a financial aid decision model that ensures the institution's student aid dollars are leveraged to build and shape the desired student body. In addition, all available institutional aid resources and restrictions on their disbursement must be identified in order to assure their full utilization. The model should be used to formulate a recommendation for deploying those projected available financial aid resources in such a way that the University's enrollment and revenue targets are achieved. The model should provide an analytical process for assessing a particular student group's willingness to pay so as to ensure effective packaging of student aid. Student aid packaging and awarding strategies should directly support new and returning student enrollment goals as well as maximize student fee revenues. The Committee will provide the Provost and the Vice President for Student Affairs an annual briefing of its findings

and recommendations. The recommendations must contain a four-year financial plan that links the campus's deployment of student support and the campus's net student fee revenues.

The Committee has now been functioning for two years and is responsible for a complete re-design of the way in which centrally-controlled merit-based scholarships are distributed. While a detailed financial analysis will not be possible until shortly after the Fall 2001 semester begins, all evidence suggests a major success in terms of enrollment growth and net student fee revenue.

The Student Financial Support Executive Committee initially focused only upon the financial support issues mentioned in the charge statement. However as the Committee got more deeply involved in this effort by engaging Noel-Levitz to help implement a financial aid leveraging system, the work of the Committee began evolving toward an enrollment management role. It was not possible to separate enrollment goals as they related to financial aid leveraging from the overall first-year student enrollment goals. The analysis process is holistic and demands an overall strategy for recruiting and enrolling each first-year class.

Because the mission of the Student Financial Support Executive Committee has evolved into a broader enrollment management one, we recommend that the Committee be re-named the WVU Enrollment Management Council. The charge of the committee should be broadened and should be as follows:

The Enrollment Management Council is expected to continue to monitor and refine the financial aid leveraging strategy in place at WVU with the goal of shaping the first-year class academic profile, maintaining enrollment goals, and maximizing net student tuition revenue to the campus. In this role, the Council will provide support to the Assistant Vice President for Enrollment Services in making operational decisions. In addition, the Council is expected to develop a strategic enrollment plan that addresses the appropriate mix of in-state vs. non-resident, graduate vs. undergraduate, on-campus vs. off-campus, and first-time vs. transfer students. New student markets should be identified for future development.

The Council should identify ways in which prospective students may interact with the University electronically to the extent they wish and are comfortable. It should be possible for a student to complete the admission process without ever having a piece of paper pass directly between the student and the University. Of course, official documents such as high school transcripts and test scores may be submitted in paper format. Students should have one point of contact for the entire pre-enrollment process that would encompass communication about and processing

related to: admissions, records, academic programs, housing, student accounts, financial aid, new student orientation, and scholarships. The central contact point would be responsible for communication with the appropriate University office on behalf of the student. The process should be student-centered and high touch. To the extent possible, contact with students should be personalized through telephone or e-mail contact.

To accomplish these goals will probably require internal reorganization to provide the needed human resources. The Committee is also charged with the responsibility of identifying efficiencies that will be created within the existing system by this approach so that resources can be liberated to support implementation of the new system. For example, serious consideration should be given to implementing the automated admission decision-making process available in BANNER.

The current membership of the Committee includes: Russ Dean, Narvel Weese, Brenda Thompson, Duane Nellis, Amir Mohammadi, Lyn Dotson, Keith Garbutt, and Carolyn Curry. The Committee is co-chaired by Russ Dean and Narvel Weese because the original focus of activity related to financial modeling. This broader charge and the consequent changes that will be required will be more Student Affairs focused. Thus we recommend that Russ Dean and Amir Mohammadi co-chair the newly formed Council for the next year or two. Ultimately, the new Assistant Vice President for Enrollment Services should chair the Council. We also recommend adding Dr. Sue Day-Perroots to the Council since non-traditional off-campus students represent a major market that should be more fully explored. We expect most major growth in the University enrollment to occur in this population segment.

In addition to the Council, we expect several work groups to be formed that will address specific enrollment management goals. For example, enrollment and retention targets should be set for each college/school of the General University. In this case, the work group would be composed of some members of the Council, but predominantly representatives from the academic deans, the Provost's Office, admissions, recruiting, and budget planning. Other work groups will be needed to address topics such as improved undergraduate student retention and increased undergraduate transfer student rates. The full range of work group activity cannot be defined until the Council is formed and it develops its overall strategic direction. However, it is expected that work groups will generally be composed of members of the Council as well as non-members who have specific knowledge of the topic and whose units' activities are affected by the outcome.

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We believe this recommendation represents the next logical step in enrollment planning at West Virginia University. Our current system is very sophisticated and effective. If the vision outlined in this proposal can be made reality, we will be at the cutting edge of recruitment and retention strategies and will be in a strong position to shape and control our student enrollment future.

We look forward to your comments and reactions.

RKD/sk