

Enrollment Management Steering Group

December 18, 2007

Minutes

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- There was no November meeting. A set of announcements was distributed and is available by visiting <http://registrar.iupui.edu/emc/emsc-meetings.shtml>

Announcements from the Chair

- Though the number of admits for spring is always significantly smaller than fall, admissions numbers look good for the spring.
- Spring enrollment is running slightly ahead of last year. A summary is appended below that includes any shift in enrollment within each school for undergraduate and graduate students.
 - For more on admissions and enrollment visit <http://imir.iupui.edu/picx>
- IMIR and Enrollment Services will offer two workshops to the schools and other campus units on the sources and use of institutional data. These workshops are intended to help users in their planning and evaluation efforts. The sessions are scheduled for January 17th and 25th and invitations were sent to EMC and APPC members and others in their units who may find such training useful. To date 24 people have signed up and a reminder will be sent in early January. Our hope is that this workshop will be offered annually in the future.
- The chancellor announced a new need-based student aid initiative on Monday. For details visit <http://info.iupui.edu/news/page/normal/3388.html>

Constituent Relations Management Software

- There are a number of new enrollment-management tools available to help with different aspects of enrollment management and retention.
- Constituent Relations Management (CRM) software allow institutions to more easily identify prospective students and to track and tailor individual communications with them. The same functionality can be used to support retention efforts by improving institutional contacts with our current students. Such tools make use of data from a variety of sources and integrate with an institution's SIS.
- In universities, these tools are used most commonly for managing communications with prospective students and with alumni. We would like to build on that, maintaining a good communications stream with students from multiple offices at least through orientation and their initial enrollment. The tools generally are flexible enough that they would allow schools to continue to use them with their students throughout their academic careers.
- In order to remain competitive with other institutions, IUPUI should use such tools. IUN is already using a CRM product and IUB and IUE just signed a contract.
- One vendor is Talisma http://education.talisma.com/tal_solutions/strategic_enrollment.asp. Another major vendor is Hobson <http://www.hobsons.com/sitesearch/search.jsp> with whom IUB has contracted.
- Becky distributed an excerpt from a draft RFP that provided a summary of expectations we have for a CRM system. The product must:

- Enable the university, the admission staff and other ES offices to target and reach prospective and current students using advanced personalization technology.
- Provide multiple channels (phone, e-mail, surface mail, text messaging, blogs, chats, etc.) through which communications with each audience can be conducted and tracked.
- Provide a workflow tool to automate assignment of a customer to a role based on specific criteria or activities, track their interests, and personalize our communications with them.
- Provide for ease of data import and export between systems.
- Provide dynamic reporting tools.
- Provide numerous system integration and self-service user interface functionality.
- Meet other requirements in the areas of managing effective communication campaigns, system integration and contact management.

Discussion

- Chris Foley told the group that we have limits in when we can load prospective students to the SIS. Adoption of CRM software would allow us to track and work with these students much more efficiently until such time as they move from “suspects” and “prospects” to applicants. It would also allow for ease of sharing lists of these candidates with the schools and other offices and providing a unified log of all communications.
- CRM allows for more regularly scheduled and personalized communications with potential students, tailored to their interests. The greeting visitors receive from Amazon.com is one example, where in addition to being welcomed by name, Amazon suggests books that may be of interest, based on past purchases.
- The tool could identify students who appear to be eligible for a particular scholarship and should an application for the award be required, automatically contact the students with information on how to apply.
- Chris told members that these tools are complex to set up, but once in place are far less complex to use and allow for more unified data and faster and easier processing. 7-8 of the Big 10 have implemented such functionality and Chris has heard very few regrets.
- Becky noted there are three costs involved to such an initiative
 - Initial acquisition cost
 - Cost of staff to implement and run the system
 - An annual fee

Becky told members that Enrollment Services has set aside funding to cover the cost of acquisition of the software needed for use by ES. Depending on the interest in use by other units, such as the Graduate School or International Affairs, additional funding may be required.

No additional funding is being sought for staffing. Chris is working to redeploy current staff not only for this functionality, but also to meet expanded recruiting efforts. This software should provide greater efficiency in processing that will allow flexibility in staffing assignments.

Becky believes the annual fee could be covered by moving some current expenditures for contractual services provided by Goal Quest and Apply Yourself into CRM which replace those same functionality in those products.

On a related point, ES still has some costs to address with the eventual move into the Campus Center and in finding temporary locations next summer for staff members that are not moving to the Campus Center when Cavanaugh has some HVAC work done next summer. This will displace staff for up to six weeks.

- Members agreed that having a demonstrated return on investment was important. We also need to be sure that any new software will work well with PeopleSoft so that we do not repeat having to have policy or procedural decisions limited by what the software requires.
- Becky and Chris noted that implementing a prototype would probably take 6-7 months after software acquisition.
- Becky will share a draft of the RFP with the Steering Group and encouraged members to review it and send any suggestions or comments to her. The group was asked to be sure we are adequately representing the complexity of the institution and the students we serve. We don't want to miss any important functionality.
- In addition to sending Becky their comments on the RFP, members were encouraged to learn more about CRM by reviewing materials from a recent webinar entitled "Building Your CRM Short List." Slides and the audio for are available by visiting <http://registrar.iupui.edu/emc/emsc-meetings.shtml>
- Time did not allow a discussion of Business Intelligence analytical tools.

Upcoming EMC Meetings and Tentative Topics

January	Meeting replaced by workshops on the use of institutional data January 17 and January 25	
February 22	1:00-2:30	CE 268 (new location)
March 28	1:00-2:30	CE 268
April 25	1:00-2:30	CE 268
May	No meeting	
June 27	1:00-2:30	CE 268

EMC Steering Group Meetings

January 11	3:00-4:30	CA 438 (note change in time this meeting only)
March 21	1:00-2:30	TBD
June 13	1:00-2:30	TBD

SPRING Enrollment Update

Spring 2008 - 12/17/2007

INDIANAPOLIS Enrollment

Credit Hours Taught

	12/18/2006	12/17/2007	Change	%
School	2007	2008		
BUS	18,487.5	19812.5	1,325.0	7.2%
DENT	12,656.5	12805.5	149.0	1.2%
EDUC	10,879.0	10858.5	-20.5	-0.2%
EGTC	16,398.0	16629.0	231.0	1.4%
GRAD	259.0	540.0	281.0	108.5%
HERR	7,852.0	7994.0	142.0	1.8%
INFO	3,250.0	3512.0	262.0	8.1%
JOUR	1,006.0	957.0	-49.0	-4.9%
LAW	12,198.0	11889.0	-309.0	-2.5%
LIBA	48,179.0	48492.0	313.0	0.6%
LSTU	288.0	255.0	-33.0	-11.5%
MED	26,080.0	26662.0	582.0	2.2%
MUS	3,063.0	3011.0	-52.0	-1.7%
NURS	10,942.5	11201.0	258.5	2.4%
PED	11,257.0	11354.0	97.0	0.9%
SCI	47,029.0	48882.0	1,853.0	3.9%
SCS	462.0	247.0	-215.0	-46.5%
SHRS	2,462.0	2354.0	-108.0	-4.4%
SLIS	1,633.5	1836.0	202.5	12.4%
SPEA	7,105.0	6913.0	-192.0	-2.7%
SWK	6,756.0	7133.5	377.5	5.6%
SWT	7.0	4.0	-3.0	-42.9%
UCOL	1,296.0	1261.0	-35.0	-2.7%
TOTAL	249,546.0	254,603.0	5,057.0	2.03%

Headcount by Student School

	12/18/2006	12/17/2007	Change	%	
School	2007	2008			Comments
BUS	1,758	1,925	167	9.5%	+21 ug; +138 gr; +8 non-degree
DENT	598	624	26	4.3%	+5 ug; +21 gr; +3 in GRAD
EDUC	1,505	1,431	-74	-4.9%	-1 ug; -2 gr; +3 in GRAD; -71 n-deg
EGTC	1,708	1,775	67	3.9%	ENGR:+70 ug; -6 gr; +2 non-degree TECH: -10 ug; +11 gr
GCND	236	205	-31	-13.1%	-31 non-degree
GRAD	551	505	-46	-8.3%	See notes in individual schools
HERR	753	745	-8	-1.1%	-6 ug; -1 gr; -1 non-degree
INFO	432	453	21	4.9%	+39 ug; -19 gr; +1 non-degree
JOUR	147	123	-24	-16.3%	-24 ug
LAW	926	934	8	0.9%	+13 gr; -5 non-degree
LIBA	1,240	1,264	24	1.9%	+22 ug; -33 in GRAD; +2 non-degree
LSTU	13	12	-1	-7.7%	-1 ug
MED	1,390	1,414	24	1.7%	-7 ug; +37 gr; -21 in GRAD; -6 n-deg
MUS	30	35	5	16.7%	+5 gr
NURS	1,323	1,343	20	1.5%	+14 ug; -1 gr; +5 in GRAD; +7 n-deg
PED	767	773	6	0.8%	even ug; +6 gr
SCI	1,519	1,555	36	2.4%	+30 ug; +14 gr; -8 non-degree
SCS	871	750	-121	-13.9%	-78 ug; -19 gr; -24 non-degree
SHRS	174	170	-4	-2.3%	-1 ug; -3 gr
SLIS	284	311	27	9.5%	+31 gr; -4 non-degree
SPEA	808	740	-68	-8.4%	-11 ug; -58 gr; +1 non-degree
SWK	627	636	9	1.4%	-2 ug; +9 gr; +3 in GRAD; +2 n-deg
UCOL	4,644	4,743	99	2.1%	+123 ug; -8 HS; -16 non-degree
IN	22,304	22,466	162	0.73%	
Unduplicated	22,270	22,432	162	0.73%	

IUPUC Enrollment

TOTAL	10,762.5	11,323.5	561.0	5.2%
Grand Total	260,308.5	265,926.5	5,618.0	2.2%

CO	1,000	1,025	25	2.5%
Grand Total	23,270	23,457	187	0.8%

Office of the Registrar