Salt Lake Community College
Enrollment Services
Phase One 2012-2013 Program Review

February 28th – March 1st, 2013

<u>External Program Review Team</u>

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Special Acknowledgement

We are incredibly grateful to all of the staff, faculty, and students who took time to meet with us and for their honesty and openness as we looked into the way SLCC delivers services and how they honor the value statement of "Students first and foremost".

The review team also wishes to express its gratitude to Janet Felker, our kind and resourceful host, who extended gracious hospitality to us prior to and throughout our visit. The bottles of water, the candy, the impressive meals and the staff's kindness made it so we could easily focus on the tasks at hand in order to provide the following feedback and recommendations.

Program Review Logistical Overview

Prior to the site visit to SLCC on February 28th and March 1, 2013, the team carefully read and reviewed the 123-page self-study document. We created a spreadsheet of over 100 questions that were asked both prior to and during the site visit to provide clarity and to assist us with our review.

During our pre-visit call with Janet Felker, Eric Weber, and MaryEtta Chase all three team members commented on the benefit of having a well-written document which provided us with a thorough assessment of each of the five areas we were to evaluate during Phase One. We were impressed with the work that the leads in each of the areas put into their written unit reviews and the supplemental information provided in the appendix.

Our two days on campus were action packed and the method by which we split into different interview teams served us well to be able to gather as much information as possible from the widest variety of staff and students.

Executive Summary

Vice President Deneece Huftalin set the tone for both our approach to the site review and this written feedback when she shared her New Year's Resolution to "be bold". We were encouraged to provide feedback that would help SLCC to be more efficient while maintaining quality and to be candid, think big, and to approach the department review holistically.

We appreciated Deneece, Eric, MaryEtta and Janet allowing us to be very bold and forthright in our concluding conversation at the end of the site visit. We trust that our comments were taken in the spirit of support for the solid work performed each day by Salt Lake Community College staff dedicated to the students, their professions, and each other. As Helen's metaphor of the dog losing its grip as it runs across the newly shined kitchen floor reflected, there is nothing wrong with the dog in terms of SLCC's Enrollment Services' division, except that the college has grown faster than perhaps it

was prepared for and the need for sophisticated online technological solutions is a daily pressure and reality.

The following represents the major themes (in bold) that we arrived upon after the site visit was concluded. Following this Executive Summary will be specific feedback and recommendations for each of the 5 sub-units assessed. We have included feedback and recommendations for the external areas we reviewed in Appendix A, as well.

When we had an opportunity to assess our overarching themes at the end of the two-day visit we determined that SLCC does not have major problems; but they have significant opportunities. It appears to us that SLCC has grown greatly in a very short time and especially with the recent national enrollment growth since the economic downturn. There is a need for organizational realignment to address the issues that staff defined both in the self-study and during our interviews as a need for more positions and more space, but we think this need is related more to how the current resources are being utilized.

The overarching theme that became quickly apparent after reading the self-study and talking to staff on campus is **a need for enhanced technological solutions and support**. Enrollment Services staff, the students, and all of the individuals that serve in departments dependent on Enrollment Services have asked to have more processes and forms available online and to enhance how the Banner Student Module is being utilized.

The relationship between the Office of Information Technology and Enrollment Services quickly became an issue not related to the personalities working in both areas, but how they interact when it comes to identifying project priorities and how to move the items off of the famous "project list" to actual implementation. We believe there needs to be an institutional strategy in place, with support and leadership from the executive level to assess what is creating the block between the need for technological improvements and delivering solutions to these identified needs.

After reading the self-study, and within an hour of our site visit, it became evident that there needs to be at least one Banner/technology position within Enrollment Services, but possibly more. We recognize that with declining budgets it may not be easy to add a new position, but if there was a management retirement or resignation in the future, for example, that this would be an ideal opportunity to recruit and hire a seasoned registrar professional with experience in delivering services through the Banner Student Module. Programmers are hard to hire now at community colleges with the challenge of private industry being in a position to offer much higher salaries for the same skill set. So, we are not suggesting that this be the new position for Enrollment Services, but instead to bring in an individual who knows the software, as well as the business of Enrollment Services in a large community college setting.

This person would not only be able to track and coordinate the technology needs for all of Enrollment Services, but could work with ES staff to outline what business processes

needs enhancing, to identify best practices from sister Banner community college institutions, explain the business practices to and coordinate with OIT leadership and developers/programmers on solutions. This person could assume responsibility for the Banner "Project List" and work closely with MaryEtta and OIT leadership to prioritize the items on the list and to identify timelines for completion that are reasonable and attainable. Finally, this position would liaison with departments external to ES to coordinate Banner and other system needs. This could be accomplished by creating and leading a Banner Student Module Core Team designed to be an advisory team to this position to identify needs, troubleshoot solutions, and assist with the prioritization of needs. A sample of the Banner Student Core Team that has accomplished this goal at Lane Community College is in Appendix C.

From the initial review of the self-study report, it was unclear what the "Student Express" service does and for whom. Helen, who was not familiar with SLCC, was particularly surprised to learn that this was not the one-stop shop model adopted by so many community colleges nationwide. Even after visiting in person this still was ambiguous and when we asked the student panelists to tell us what Student Express does they did not know and one even thought it was an express bus line.

Student Express, Front Line Services, Incoming Transcripts and the Data Center all represented in the self-study and in our interviews a need for more staffing and enhanced space to better serve students. However, as we watched the inflow of customers to the Student Express area, we witnessed three challenges which demand more resources than necessary: 1- students appeared confused and had to ask where to go, 2- they had to go to different people for each unique need, and 3- each employee has conflicting customer demands; did they answer the ringing phone, greet a customer, finish the email, stop the banner process, etc.

The Student Express area is perfectly positioned to become more of a one-stop for Enrollment Services and to triage a higher level of needs. With so many services being offered online and more to come, staff at the Student Express could be the first point of service for students coming to Enrollment Services. If you were to limit access to the staff within the Enrollment Services suite from having direct contact with students calling or coming in person, we believe their productivity would increase, as they focused more on computer and paper processes without a constant stream of interruptions. Staff at Student Express could approach the "back shop" staff for exceptions or more high-level assistance, acting as liaisons for the students, without having the students actually moving around within the relatively small area of Enrollment Services. If Student Express needs a back area/home office person to interact with the student, that staff member could come out to the public area to meet this student. By having the back area staff member model their response to an exception or tough question to a Student Express staff member it can provide training for the front line person to be able to answer this same question when asked again. If the back area/home office person needs to make an exception, they can triage this with the student without having students walking around within the Enrollment Services' suite.

This approach will significantly reduce the number of 'contact points' each student experiences with your staff, which consequently reduces the workload on your staff as well. Remember, each interruption takes time for both the student and employee, even when the answer is – 'they can help you over there'.

As a person external to Utah and what was described as a culture that values humility, Helen was surprised that **there was not more of an internal celebration or recognition that Enrollment Services is able to support the production of the third highest number of associate degrees for any school in the nation**. That is an incredible accomplishment, given Utah's population compared to Florida, California, Texas and New York and could not happen without strong systems working efficiently and the dedication of all staff working with students from the point of recruitment all the way through to commencement.

As SLCC outsiders, Helen and Mark were surprised at the confusion non-Enrollment Services staff had as to what constituted Enrollment Services. Some described the departments that report to Eric Weber as Assistant Vice President for Enrollment and Student Services as Enrollment Services and some subunits within Enrollment Services, even used the term Enrollment Services as a unit separate from their own! The Marketing department at SLCC has done an amazing job of unifying the signage on campus to match that found on the website and there is a sense of unity for visitors as a result. If this department could be engaged to develop an internal campus marketing campaign for Enrollment Services, designed to make it clearer for student, faculty and staff to understand what they do and how they do it, it would not only improve efficiencies, but also serve to unify the various units within the department more closely together.

Typically the registrar has a prominent place among the faculty, not only by regularly attending Faculty Senate meetings as a resource, but also as the campus custodian and primary trainer for the Family Educational Rights and Privacy Act (FERPA). The four faculty interviewed stated that it would never occur to them to contact MaryEtta with a FERPA issue and instead they went to the risk management individual instead. We strongly believe that if MaryEtta can assume a higher profile with the faculty and the campus, at large, that the challenge with campus staff not really knowing what Enrollment Services encompasses and what they do for students and staff will dissipate. By providing tips for faculty and staff on FERPA issues and conducting more campus departmental trainings, MaryEtta could bring attention to Enrollment Services as a resource for more individuals and lift up the prestige of this division.

Communication and training was an issue identified both in the self-study and interviews with staff external to Enrollment Services. While Helen and Mark were incredibly impressed with the training outlined in the self-study, with 13 campuses, the satellite campus staff is not always able to attend training. There is room for improvement and we have some suggestions for augmenting the current communication and training channels.

Finally, we shared with Deneece and Eric that we thought **there could be more attention paid to mentoring staff and encouraging leadership by moving "doers" to become "innovators", as well.** Several staff made reference to the new Talent Management job structure requiring staff in designated positions to have higher level of college degrees than was required in the past. We recognize the value and importance of this effort. At the same time, we found this is threatening to some who do not possess the new credentials. We are also concerned this could serve as a distraction from their perceived ability to make a difference for students through continuous improvement of the processes they represent.

As Registrar, MaryEtta follows in the footsteps of Loren Evans who served for 35 years and whose personality and way of working most likely still remains in the minds of the majority of faculty and staff at the college. With the upper level administration supporting steps MaryEtta might take to create a culture in Enrollment Services of being bold, rewarding innovative ideas, and trying new ways of doing business, those who feel disempowered and only able to succeed by having more staff will undoubtedly feel more secure and able to perform their jobs.

As we stated before, Enrollment Services at Salt Lake Community College is getting the job done better than the majority of community colleges in the nation when it comes to meeting the completion agenda. They need internal resources to address the crushing technological demands on the registration industry faced by all schools and to coordinate more strategically with the leadership and staff within OIT.

<u>Specific Unit Feedback and Recommendations</u>

The Program Review team was assigned to meet with a variety of Enrollment Services' staff, students, and staff external to Enrollment Services. The following represents a recap of what was represented as their strengths and challenges, and our assessment and recommendations for meeting the challenges.

<u>Student Express</u>

Clifton interviewed the Student Express team members and reaffirmed the strengths and challenges referenced in the self-study.

- Self-Study Identified Strengths

    o Quality customer service for first time and repeat customers
    o Diverse, cohesive team
    o Cross-functionally trained in other Student Services areas
    o Broad based knowledge helps rest of Student Services
    o Ability to empower students toward self-sufficiency in admission, advising and enrollment processes

- Program Review Team Identified Strengths

  - Customer service
  - Cross functionally trained, ability to assist other departments

- Self-Study Identified Challenges

  - Maintaining current and accurate information on academic program websites. This is not a criticism of Student Express, but more of a college-wide issue.
  - Communication/current information on College, department, division policies, procedures, programs, services
  - Communication with non-credit programs; School of Professional and Economic Development, Continuing Education, Short-Term Intensive Training, School of Applied Technology
  - Crowd management during peak periods—need for queuing system

- Program Review Team Identified Challenges

  - Brand Identification. While Student Express is in a distinct location on the second floor of the Student Center, signage is poorly positioned and area flow patterns not only obscure, but also inhibit student access.
  - There is a great deal of "visual noise" with a variety of signs at varying heights. There is also a great deal of clutter and color confusion that can be distracting.
  - We believe that the confusing nature of the signage reflects the confusing nature of who serves whom. The end result appears to be that students ask and are pointed in the right direction. The goal would be to have an organization and a brand messaging system that inform students so they do not have to ask.
  - 'Quantity' of service—Student Express personnel, if organized differently, could provide a broader array of services to students if synergized with Front Lines in a one-stop model
  - Operating model—Students who use Student Express are directed to other areas for services that could be provided more effectively and efficiently in a One Stop service model.
  - Student feedback. Students from the interview sessions were not aware of Student Express' location and services. When pushed, they postulated it was a shuttle service.
  - However the students in the Student Express panel were aware and spoke favorably about Student Express. The range of comments went from appreciation for starter help to a continual relationship over many semesters.

- Program Review Team suggestions for improvement

  - There is a challenge with students not understanding who is next in line and the staff indicated that this was a problem in the self-study. If the suggestion to move to a One Stop model is adopted there will be a need for a check in station to alleviate this challenge on not knowing who is next. There are multiple software packages available for easy installation to meet this need. Lane Community College purchased SARS for a relatively small fee and this works beautifully to provide students with a way to check in. The guests come to a station staff by a Work Study student who has them type in their student identification number if they know it or they assign a guest number for prospective students. Students then record what they are there for, which provides very helpful reporting for assessment of the demands on the one stop. Staff calls out the name of the student (which can be a pseudonym, if the student desires) and it is easy and clear for all to see who is next in line.
  - Consider consolidation with Front Lines and reorganizing into a 'One Stop' model that provides more 'front of house' services to students at point of first contact, thereby reducing students being directed to multiple locations.
  - Consider redesign of space, signage management and location of 'public' information channels (e.g., monitors) so that Student Express is readily identifiable, and that students can quickly view pertinent announcements and information, which can help them, more quickly determine the level of service required. The current monitor faces away from students waiting to be seen and is way, too high above their heads.
  - Student Express is poised brilliantly with the right space and the fortunate alignment of responsibilities within Eric's and MaryEtta's stewardship to pull off the most effective and rewarding one-stop solution.
  - A one stop model will also enable significant streamlining of their messaging in terms of the their brand, services and solutions.
  - Their challenge is not based on enough staff, but that they have a significant structural problem where staff is required to do too many things at the same time, and customers aren't sure who can help. Providing one stop for customers and decoupling conflicting work demands will not only reduce workload, but also raise office morale and customer satisfaction.
  - Structural issue: The current model requires staff to greet customers, answer phone calls, email students, do data entry, and even run 'processes'. This model guarantees conflicting demands and frustrated customers and staff.
  - We recommend separating these functions as much as possible into 4 core areas:

    -Data Center – does all data entry, reporting, and Banner processing. This entity should be moved to the back end of the office.

- One Stop – Recommend more than just a triage solution where they provide all in person services. Think of a 90%/10% ratio of services. Anything that requires counseling/advising or exceptions to policy would be referred to home office (that's the 10%). We recommend a desk or station near Student Express where the home office staff can come out to respond to these exception processes. The remaining 90% can be handled by trained staff at one location.

- Phone Center – using a queue management system, staff can be designated (or rotate) to respond to all incoming phone calls and emails. This should be the only published phone number for all services (admission, registration, records/transcripts, graduation, etc.). This is often part of a one stop where personnel rotate between the in-person service area and phones.

-Home Offices: these then own the processes, training, updates, upgrades, policy etc. for each of the main functions of an office. Entities include: registration, graduation, records, transfer office, and 'admissions'.

Data Center

Mark and Helen interviewed the Data Center Team Members and reaffirmed the strengths and challenges referenced in the self-study.

- Self-Study Identified Strengths

  - Providing accurate processing for admissions processes
  - Providing experience and expertise to advise offices needing their assistance.
  - Finding solutions for Banner coding problems
  - Retaining long-term trained employees

- Program Review Team Identified Strengths

  - Calm, steady leadership of the unit provided by Joyce
  - A cohesive unit that supports each other and prides itself on reliable customer service
  - Allowing Data Center staff to attend institution and Ellucian training opportunities to maintain and enhance skills.
  - "The data center model facilitates one of the cleanest and most accurate student databases I've ever seen." – Mark Simpson
  - Data center staff integration into vital data-centered campus committees (p. 40 – SLCC address committee, duplicate SID committee, data integrity committee, FSA atlas, Nolij standards, and Banner user committee). This involvement utilizes Joyce's expertise, encourages ES personnel

leadership opportunities and provides ES team important information about processes and future needs.

- Self-Study Identified Challenges

    o Lack of technology support. Specifically they want the Admissions Update form to be online, to finish the International, Concurrent and Early Application projects, automate residence comments and incorporate SAT processes into current system and to move the Student Interest cards outside of Banner
    o The lack of an Admissions Office
    o The lack of full-time staffing in the Data Center and the replacement of the two lost positions. This is one key area where ES can most fully take advantage of a Project Manager position. In order to make up for lack of processors, the institution a few realistic options: 1- reduce data entry needs (not easy to do) or two, provide more self-service and automated solutions for the campus.

- Program Review Team Identified Challenges

    o The lack of an Enrollment Services Banner expert in Enrollment Services to triage the large number of technological enhancements and to coordinate the prioritization of these with OIT
    o Staff are expected to enter detailed points of data into the system while answering phones from campus staff, the students and the public and those walking up for service.
    o While the Data Center likes the new admissions' application designed by OIT staff, there are, too many different admissions applications and forms upon which information comes to the Data Center to enter into Banner.
    o While the realignment of physical space is an overarching recommendation, it is very true here in the Data Center. Joyce's proximity to the front door places her in a position of customer service and ES ownership. We recommend considering placing all Data Center staff at the back of the office and separated from initial customer interaction (phone or in person).
    o Based on her predecessor, Joyce inherited an expectation that she be an expert in reporting writing and data gathering. This can prove overwhelming at times and challenging.
    o Sense of Team Value: The Data Center staff really wants people to realize what they do and their value to the institution "not for credit where credit is due, but for resource allocation." We think this sense of being undervalued might add to the hopes that the title Admission Office would demonstrate institutional recognition and value.

- Program Review Team suggestions for improvement

  o Discontinue having staff uses a paper application to apply. Staff can pay the $40.00 fee and the Business Office could reverse this out once they enrolled as an incentive to enroll and increase FTE.
  o Once there is a better process in place to move on the Project List for Banner at OIT, they could consider purchasing the Runner Technology that provides an easy mechanism to catch students entering bad addresses in the application at the point that it is being entered. This would make it so it would not have to be cleaned up later.
  o Use any resources coming from a retirement or resignation of a management position in Enrollment Services to hire a seasoned Banner Student Module registrar professional. This person would not only be able to track and coordinate the technology needs for all of Enrollment Services, but could work with ES staff to outline what business process needs enhancing, to identify best practices from sister Banner community college institutions and coordinate with OIT leadership and developers and programmers on solutions. This would make a significant difference for the Data Center, who has a high number of items on the "Project List".
  o Consider moving the application deadline from 5 days before the start of the term to 10 days to allow more application processing time and time for advisors to find classes for the students.
  o Fast track the creation of an online Admission Update Form. A simply data entry form can easily be created (Lane Community College uses the Drupal website software for this and staff in the departments are trained to easily create these and use these for simply data such as this) that would allow students to provide this information online. This is a high priority for the satellite Student Services, as well. If they were to clone the current admissions online application for this process and sift out the data they do not need to gather again, they could abandon the part where students pay at the end and use the same "push processes" inherent in the current admissions' tool.
  o To respond to the challenges with FERPA issues coming from the Concurrent Enrollment Staff and the high school staff wanting information, as long as you identify them as school officials in your FERPA policy, you may share information on these students with them without a written release from the students.
  o Adopt the Banner Student Information Release process utilized by Lane Community College within the myPage log in for Concurrent Students to use to provide a password that loads into SGASTDN Comments that parents can use when calling for certain information on Concurrent students if they share the correct password. You can restrict this to enrollment and billing information and not grades or class attendance. (See Appendix E)
  o Create a student number look up tool in myPage for staff in Concurrent Enrollment high schools. Lane did this by creating SPAIDEN records for

designated high school staff, providing them basic FERPA training, and teaching them to enter the portal to access this simple tool that uses the students last name and date of birth to retrieve Lane student identification L numbers.   (See Appendix F)

- o A decision to not use the Banner Admissions Module, which we understand, adds additional processes that must be done by staff and this creates the challenge with keeping within the 48-hour traditional time frame for input and admission. To alleviate pressure on the Data Center, publish that during peak times this will be 72 hours instead.
- o While we have read the need for an Admissions Office, we think that if all resources available can go toward hiring a Banner manager in Enrollment Services and by having the executive team lead a strategic review of OIT is managing and able to respond to ES system enhancements that there will not be a need for this.   While we are not endorsing hiring additional admissions staff, we do think that the words "Admission" in the messaging, signage and web presence is one that prospective student identify with and are taught regularly through informal channels. "Admissions" is a critical marketing term that needs up-front attention (signage, marketing, etc.)
- o In their current model, the Data Center serves exactly as an admissions office. This is particularly true since Recruitment is separated. If the division chooses not to simplify their model (in person, data processing, and home offices), then changing the title of the Data Center to Admissions makes sense. It also then makes sense to keep Joyce up front.
- o There are many demands on the Data Center and ES to produce online forms and processes by students, external staff and the faculty. As a way to manage expectations it might be advisable once the Banner manager is in place to publicize the list of priorities with expected timelines so that they know their needs have been heard. It sounds risky, but it will help with the Public Relations effort to position the Data Center in Enrollment Services division in a position of strength, as opposed to consistent apologizing and defending.

- Appendix Items of Interest to the Data Center

    Lane CC ESFS Update sample
    Lane CC Banner Student Core Team description
    Lane CC "Under 18 Student/Parent Consent Form"
    Description of Lane CC Banner Student Information Release Form
    Lane CC Student Number look-up tool in portal

Incoming Transcript Evaluation

Helen interviewed the Incoming Transcript team members and reaffirmed the strengths and challenges referenced in the self-study.

- Self-Study Identified Strengths

    o Ability to make improvements to streamline processes and improve turnaround time
    o Communication with students on the status of their requests
    o Having a strong relationship with academic departments
    o Maintaining a respectable level of service while handling increased volume

- Program Review Team Identified Strengths

    o Office is very neat and orderly, which helps to somewhat alleviate the overcrowding issue.
    o Manager is a team player who leads and assists with the workload
    o Office is held in high esteem by faculty and external departments

- Self-Study Identified Challenges

    o Identifying a process by which transfer students can identify their Program of Study goals at SLCC
    o Having to retrain faculty chairs when there is turnover on the evaluation processes associated with determining transfer credit equivalencies
    o Having to provide special reviews for Health Sciences applicants
    o The location of the office attracts students and staff who do not really need assistance from Incoming Transcripts causing delays in productivity
    o Incoming Transcripts is confused with Graduation processes.
    o The need for standardized training manuals for Banner and Nolij
    o Not enough space for documents being retained by this office.
    o Not enough support from OIT and ability to move project requests up on the "Project List"
    o Not being seen as a part of Enrollment Services for now, yet being responsible to respond to walk up traffic and not being able to close their blinds and doors to discourage this.
    o Finding the time, energy and financial resources to explore what is available.

- Program Review Team Identified Challenges

    o Their accessibility to the public is distracting them from the task of articulating transfer credit.

- o The staff and their manager have a stepchild sense of placement within Enrollment Services and they resent that they had to switch offices.

- Program Review Team suggestions for improvement

    - o There is strong resentment from both this team and their current leader that they lost the space now occupied by School Relations. This was reaffirmed in the meeting with Carol Sandoval who suggested that School Relations could move to the first floor of the Student Center. They will be transitioning from reporting to Carol Sandoval to MaryEtta Chase in December, after Carol retires and Helen encouraged them to let go of their desire and request to have their old space back. It is unlikely that this is going to occur and so it becomes energy spent in the wrong direction. We do believe that it would make sense to relocate this unit closer to Graduation and perhaps where the Associate Registrar's office is now. This would move them further from the reception area and could decrease the traffic dropping by for other reasons.
    - o There is a significant opportunity for structural alignment here or with the Data Center. The institutional curriculum knowledge required for this responsibility along with the common contacts for both Transfer and Graduation, suggest an opportunity to align the two functions.
    - o We could also recommend another alignment with the Data Center where they enter all transcript data, and the Transfer/Graduation team simply (not that this is ever easy) handles the articulations.
    - o Helen was shown the file cabinets both internal to Incoming Transcripts and externally as a way to support the need for a bigger office space. While this suggestion will not be popular with this unit, it is suggested that they discontinue the practice of retaining paper documents scanned for two years after they have been received. It is a best practice when using a document imaging system, such as Nolij, to not retain the paper after scanning and to trust the electronic archiving system. They could reclaim a significant amount of space by adopting this best practice. If they want to cut it in half at first, they could go down to 1 year, just a way to ease into this if there is, too much nervousness that items will be somehow lost in the document imaging system.
    - o The name "Incoming Transcripts" is misleading and since it has the word transcripts in it, will always be confused with Graduation, who handles outgoing SLCC transcripts. We suggest that they change their name to "Prior Credit Evaluation" office to assist with removing this confusion.
    - o The Incoming Transcripts staff spends a great deal of time having to review transcripts to support the Health Sciences admissions' process. We suggest that instead of having to follow the form provided by the Health Sciences division to find courses that they can articulate the Incoming Transcript office should request that the students use the Transcript Evaluation form, pre-populated with these required courses to identify how they have met these requirements and other institutions.

- o DegreeWorks will help to identify transfer student goals when they implement the planning tool. In the meantime, they may want to look at the Program of Study Wizard tool Lane Community College has recently developed to address this challenge at the point of admission/readmission, when changing their Program of Study and at graduation. A link to this is provided in Appendix G.
  - o This office needs to be formally welcomed to Enrollment Services when the management moves to MaryEtta. They are a highly functioning office and anything to make them feel welcome, honored and respected will go a long way.

- Appendix Items of Interest to the Data Center

  Link to Lane's Program of Study Wizard tool

<u>Front Line Reception</u>

Clifton interviewed the Front Line Reception team members and reaffirmed the strengths and challenges referenced in the self-study.

- Self-Study Identified Strengths

  - o Customer service technical expertise—exemplary at articulating and assisting the full scope of request for variety of forms, procedures.
  - o Ability to adapt and manage change as it relates to major personnel and operational changes.
  - o Data collection and analysis for strategic planning

- Program Review Team Identified Strengths

  - o Dedicated, well-trained staff. Patti attributed this as a steppingstone for part time employees who are then able to move into full time positions as well trained staff.
  - o Good ability to liaison with specialized areas/functions (e.g. DRC)

- Self-Study Identified Challenges

  - o Staffing—short 1 full-time position (lost to Contact Center several years ago), regular turnover among part-time staff, 'brain drain'
  - o IT support—need more electronic forms
  - o Training—need to maintain up to date knowledge about Enrollment Services, customer service

- Program Review Team Identified Challenges

- o Do students really need to access Front Lines directly? Can these services be performed as the 'back room' component of an integrated One Stop model?
  - o IT support. Need for upgrades to electronic forms, signatures, etc. Current system way too paper intensive for students as well as staff. Need to move paper transcripts, etc. to archives, reorient to paperless operation, as Cathartic as it is to do!
  - o It is not clear to the public (and to Helen from out of state) what the difference is between Student Express and Front Lines Reception.

- Program Review Team suggestions for improvement

  - o Consider consolidating with Student Express into a One Stop organizational format to facilitate efficient customer service
  - o Advocate for IT support to move to electronic forms, etc. to improve operations, better facilitate student requests, etc.

Graduation Office

Mark interviewed the Graduation Office team members and reaffirmed the strengths and challenges referenced in the self-study.

- Self-Study Identified Strengths

  - o Enhanced electronic delivery (PDF and email utilization) of graduation applications.
  - o Commencement RSVP solution
  - o Low turnover rate of staff – we couldn't agree more!
  - o Staff holds a comprehensive knowledge of departmental requirements in the institution. They understand the purpose and history of SLCC's policy and procedure changes.

- Program Review Team Identified Strengths

  - o The graduation staff is incredibly efficient providing graduation solutions. In the past 10 years, you have nearly doubled the volume of graduates, but not the staff.
  - o SLCC is #3 community college in the entire nation for producing graduates. This needs to be celebrated both externally and internally.

- Self-Study Identified Challenges

    o Manual analysis of degree evaluation, student academic history, course repeats, and course substitutions results in confusion, errors, and necessary overtime. While we recognize the strength of your staff to efficiently process your graduation solutions, the volume of steps and processes results in potential errors and delayed service to your graduates. There are many technological solutions that can help – see suggestions below.
    o Graduation office needs a voice at the academic advisor and curriculum meeting table.
    o Graduation Office staff often take on the work as an academic advisor (p. 73). One example, if there are disagreements about degree requirements and if the student's completed them, the graduation office is the one who intervenes with the student and the department. The office also advises students how to meet minimum GPA requirements. A full implementation of DegreeWorks will eliminate both problems and allow the academic advisor to see and discuss any degree qualification issues. This is however dependent on incoming transcript data to be posted in a timely and consistent manner.
    o Lack of an online graduation application. Fortunately, this project is underway. However, it seems it hasn't received very high priority as it has been in development for 4 years.
    o Staff qualifications place the supervisor in an inferior position than the supervised. We recognize this is in part, an effort to update your hiring requirements. However, if a supervisor with less than an associate degree can do the work, why can't others beneath her?
    o Lack of appropriate office space was a primary concern of the Graduation staff, both in the program review and again during our visit. We concur with this recommendation unless processes and tools are updated. Once DegreeWorks is online, a Graduation App is online, and if you choose to outsource your diploma delivery, the space may not be an issue.

- Program Review Team Identified Challenges

    o The manual review of degree audit completion and its associated dependence on staff to interpret degree requirements and exceptions correctly opens up SLCC and the ES team to inconsistent degree awards. It also places the graduation staff in a very powerful and awkward position. One colleague stated that the person with the most important authority on campus is the one who determines if a student graduates – "that's Linda." While she should be influential in processing them, the academic departments need to ensure compliance with their degree requirements.
    o The inclusion of an official transcript with your diploma mailing requires staff to spend dozens of hours preparing diplomas for students. It's also a very costly solution.

- Program Review Team suggestions for improvement

  o Finish your online graduation application project and integrate your Commencement RSVP solution. Banner now delivers this solution as a default solution (SHAGAPP, SHADIPL, etc.). This single effort will significantly reduce any manual data entry required for degree processing and commencement programs.
  o Formalize DegreeWorks (DW) as SLCC's official degree evaluation tool, code (scribe) as many catalog years as possible, enter all exceptions/substitutions into DW, and clear students based on DW's degree evaluation. This transparent approach will nearly eliminate confusion and interpretation challenges that the Graduation Office, Advisors, Faculty, and Students experience.
    - Once you have one catalog year coded (scribed), it's fairly simple to move backwards to former catalog year requirements. Once they are coded, it create historical Code all catalog years into the tool so that you can be This approach standardizes all degree requirements regardless of who the student is or what catalog year rules they are required to comply with. It also becomes the one location where all exceptions are applied and communicated. This transparency enables all staff, faculty, and students to know the same information and status.
    - DW handles course repeats phenomenally. As long as you designate them correctly in your Banner system, DW will display the correct course consistently.
    - DW is also the best place to list individual exceptions or course substitutions. (Note: for exceptions or substitutions that apply to everyone should be updated in the curriculum the transfer tables in Banner so that all students see it immediately – e.g. Banner's SHATRNS/SHATATR/SHATATC.
    - Scribe your minimum transfer GPA as a degree rule in DW. This will communicate to the academic advisors and the students if the requirement has been met or not.
  o Course substitutions – in addition to ensuring all exceptions are posted in Degreeworks, we recommend decentralizing the exceptions capability and assigning it to those who have the authority to make the exception. Grad staff can be experts and provide training and technical support, but it's not necessary to have them enter all the exception. In fact, the centralized approach requires interpretation of the substitution from the academic department and can result in mis-applied exceptions.
  o Consider the need to include official transcripts in your diploma mailing. While this is a nice service, it's quite unusual in the industry. We suspect the majority of students don't use it. If you discontinued this process, you could outsource the full diploma mailing process, which can/will save you time and money and allow your Graduation staff to use their valuable knowledge to help troubleshoot degree completion problems. Basically, if

a computer can do the process, let it. This will also free up significant space in the graduation office and potentially alleviate any new space needs.

- o One byproducts of your recent talent evaluation was that your graduation supervisor has lower educational requirements than those they'd supervise (specialist 1's). We recommend you align the supervisor's requirements as well, and then if Linda doesn't qualify, make a 'grandfathering' exception for her while providing a method to obtain the necessary requirements.

<u>Summary and Review of Major Recommendations</u>

What was clear from the self-study report and from all of the Program Review Team's interactions while on site at SLCC was the Enrollment Services various team's sense of loyalty, appreciation, collegiality, and concern for each other. At our closing session with Deneece, Eric, and MaryEtta, we recognize that we pushed hard to assess whether there is institutional support for Enrollment Services as a division. Clearly, there is both trust and support.

Raise the Visibility of the Registrar and Enrollment Services

The relationships between each entity is admirable and one that enables such phenomenal service. Each feel the other supports them. MaryEtta deserves significant recognition for the network of supporters the division enjoys, and for the personal dedication of staff to each other. Her relationships with her team are strong; her relationship with the campus is also very strong. This is a phenomenal foundation to establish her as a campus leader as a data custodian, FERPA expert and a service provider.

We know that MaryEtta has the support of her supervisor Eric and the Vice President from Deneece. We believe that the value that the institution places on the role of Enrollment Services could be enhanced by providing MaryEtta with more exposure to the campus; especially the faculty through enhanced FERPA presentations and trainings, involvement in curriculum conversations and with the focus on her role as data custodian.

There seems to be somewhat of a duplication of effort or overlap between some of the functions managed by Enrollment Services and Curriculum and Scheduling. It would be helpful for MaryEtta and Nate Southerland to look at their areas and see if efficiencies could be found by discontinuing the duplication. Many of the functions being done by the Curriculum and Scheduling Office are done traditionally by Enrollment Services, so perhaps some changes could be made here.

Enhance the Strategic Support for OIT from Central Administration

If Enrollment Services is the number one customer of OIT, which is understandable given the demands on the processes associated with recruiting students, admissions, the transfer of credit, enrollment and graduation, then equivalent resources need to be provided to both ES and OIT to support this need.

OIT needs attention from the administration and support to be more strategic and mindful about managing their workload demands. The integration between OIT and ES is pivotal and is being called for by not only staff, but by the students, as well. There is a need to focus on putting as many processes and forms as possible on line, to provide 24/7 service that puts the data entry into the hands of the students and not the staff.

It is clear that OIT needs a boost to understand their role in the overall success of SLCC and its ability to meet student demand. OIT staff feels underappreciated and a renewed focus from the administration to provide analysis on why it is not working as well as it could and to build validation for their place at this institution could go a long way to improve how work is being accomplished.

Without knowing more about the leadership of OIT and the depth (or not) of resources being provided to their leadership to be strategic and budgetary resources it is hard to assess where the challenges lie. It may be wise for SLCC to hire a consultant to do an analysis of OIT to recommend ways to improve efficiencies in responding to demands and to bring the team up to speed with necessary training and resources.

Redeploy Management Resources in ES for a Banner/Technology Position

We strongly recommend redeploying management resources to hire a seasoned Banner professional with experience in the student portfolio. This person would provide guidance within Enrollment Services to explore project enhancement needs, determine the scope of the projects, research best practices, identify deliverables and monitor project implementation milestones and accomplishments. This will reduce the knowledge base needed by the programmers and will allow the division to define the solutions they need.

We strongly suggest that a Banner or Technology Student Core Team be redesigned to address technology needs in Student Services. This would be led by the Enrollment Services technology manager, as opposed to the Assistant Vice President, and would meet every other week to track technology needs from within Enrollment Services, Student Services and the campus, at large. They would send member to Ellucian Live annually for training on Banner and exposure to best practices from other institutions and to enhance the reliance on the Banner list serves for ideas and guidance.

The newly designed Student Core Team Members could include:

Enrollment Services team members: one from each subunit
Programmer/Developers focused on student service needs
Curriculum and Scheduling representative
DegreeWorks team representative
Departmental admin
Faculty member
Counselor or Advisor
Student Services representative(s)

We recognize that there are always budgetary challenges to hiring additional staff and the redeploying of management resources when available or by soliciting new funding to hire the Banner registration specialist will dramatically improve the efficiency and quality of operations and services to students. There will be immediate, broad and positive impacts immediately with this hire. It would be our recommendation that this not wait for the next budget cycle, based on the demand presented loudly over the course of our review, but that the resources be identified now and deployed immediately.

Realign Enrollment Services subunits and turn Student Express into a One-Stop Operation

As stated above, when reading the self-study and after visiting, the difference between the function of Student Express and Front Lines Reception for Enrollment Services was not clear. When walking up to Student Express it is difficult to know what they do and the process by which one knows who is next to be served is equally unclear.

While there is always value to cross-training staff between Student Express and the Enrollment Services internal units, it is actually a duplication of effort and can be confusing to students and college staff.

We suggest you maintain the structural set up for Student Express, with the implementation of a queue system as mentioned above and improved signage to prospective and current students and college staff know services are available.

Services currently provided by the Front Line Reception should move out to Student Express and the students who staff this can be additional staffing for Student Express, as well. We would suggest that students no longer enter into the Enrollment Services area and that it is the Student Express staff that are the liaisons, if necessary, for those transactions. This can easily be managed by using Google Chat, allowing them to chat back office area with special questions normally presented by the students themselves.

The staff in Incoming Transcripts, Data Center, Graduation, and Residency needs to focus on processing without the interruptions of students and staff needing immediate service. If the front doors to Enrollment Services are closed, but open to staff to enter

there will no longer be a need to move an area such as Incoming Transcripts who is challenged by individuals coming there needing other areas and services.

Phones should become more centralized in Enrollment Services to respond to student and staff needs and to serve as resource for answering questions and assisting with paper and online processes.

Improved communications from Enrollment Services to campus at large

While the self-study outlined an impressive training regime with standards for training with FERPA and other processes to happen on a rotating schedule and monthly meetings conducted by Enrollment Services, there is still room for enhanced communication.

By using a tool such as the Enrollment Services Update (see example from Lane Community College in the Appendix) sent on a routine basis, MaryEtta as Registrar can not only impart important updates, information and notifications to staff on the main campus and the satellite areas, but it will serve as a way to unify Enrollment Services and build a sense of value for this division.

By including FERPA tips in these updates, the faculty will learn to depend on the expertise of the Registrar and again the prestige and respect for this division will rise.

Staff in the satellite campuses needs to know that they are valued and by including them in the dispensing of vital information along with main campus and Enrollment Services' team members they will feel more empowered to serve their students and each other.

AskSLCC is completely underutilized and was not recognized by a resource by the staff and students interviewed. This tool is designed to create questions and answers that can link to places on the website and be accessed 24/7 by all students, faculty and staff. There is a need for better documentation of procedures associated with Banner and enrollment processes and AskSLCC is as perfect resource for this. At Lane, we utilize student interns to help us with the creation of the answers to questions that naturally come through AskSLCC.

The Monthly staff meetings held by MaryEtta may be more helpful if they are held every two weeks instead and video conferencing or something as simple as Skyping just MaryEtta out to the outlier areas would allow all staff to attend without having to take time off to travel to the main campus.

Communication and knowing what is going on is empowering and is a huge basis for building strong morale. We genuinely believe that there is affinity among the staff for each other and by those in offices external to Enrollment Services; but the more you interact and the more you know, the more connected you are.

Salt Lake Community College is producing the third highest number of associate degrees and certificates in the country. That alone is reason to celebrate daily. Enrollment Services is a highly functioning division led by a strong and seasoned leader. When the technological support is in place, the institution will be able to respond more efficiently and effectively to student and staff demands and the college will be well positioned to continue to be a model institution both within Utah and nationally.

Departments External to Enrollment Services

- **Academic Administrators**

  Issues discussed:

  All four faculty chairs indicated that their relationship with Enrollment Services and especially the Incoming Transcript Office is very strong.

  Fiona Silcox from Aviation asked if LaDawn could email her when she has given students credit or permission to contact Fiona. We suggest that LaDawn contact Fiona to find out more what she needs.

  Stephen Ruffus from English does not like that policy that credits can last forever. He also has a problem with the petition to withdrawal. He does not understand whom they decide to approve. We suggest that someone contact Stephen about this issue.

  All four faculty chairs expressed a concern about the 4-6 week turn around time it takes to have transfer credits evaluated at the start of the term and the negative impact it has on them to have to quickly assess transfer credit at this time. We suggest that you consider either a deadline for the transfer evaluation forms prior to the start of the term or a statement that forms requested after a certain point will not be evaluated in time to apply to the upcoming start of the semester.

  They do not always know when the first evaluation has been done to know that they should go ahead with their out of state course evaluation. DegreeWorks access for these administrators will help with this, but in the meantime, we suggest that you give access to see the articulated work in myPage for the students who are approaching them under the Faculty tab.

  They have more and more pressure from parents and students around FERPA and were concerned that Nancy Sanchez from Risk Management was retiring and who would help them. As a national FERPA trainer Helen was shocked that they did not see MaryEtta as Registrar as their FERPA go to person. We suggest that MaryEtta offer quick FERPA trainings for academic departments to increase the exposure as her role as the major FERPA custodian for SLCC. She can also send out quick FERPA tips on a routine basis to reinforce a connection between the faculty and Enrollment Services and the Registrar.

  Suzanne Mozdy from Math wants the staff to have better articulation and a common database for articulation.

Curriculum and Scheduling

Issues discussed:

Dr. Nate Southerland reaffirmed his strong working relationship with MaryEtta and Enrollment Services, but wishes they were more closely aligned. As another reinforcement for the need for Enrollment Services to do an internal marketing campaign, when we asked him about Enrollment Services, he wanted to include Incoming Transcripts and Graduation in his comments, as well, indicating that he did not see them as part of Enrollment Services.

He indicated that it would be ideal to have Enrollment Services more connected to the curriculum development process. Mark concurred and believes quite strongly that the registrar has to be involved in these meetings/discussions to ensure the accurate implementation of program changes are applied in transfer evaluation and graduation processing. Helen observed that his should be happening with the DegreeWorks' implementation and he said it was, but that this could be another way for MaryEtta and her Enrollment Services team to be connected to his area.

Nate mentioned the challenge with the Letters of Completion and a desire by Curriculum and Scheduling to have this transcripted. Transcripting this could be challenging since this is not a degree or certificate and could be challenged by the Board of Regents and fellow USHE schools, but DegreeWorks could be used to easily assess this as a program audit developed in the tool and an Advising Worksheet created that could be used to replace the need for the production of this letter by Enrollment Services.

Regional Directors

Issues discussed:

We met with Shannon McWilliams and Carol Sandoval. We were very impressed with their ability to consolidate many student services into one area. They are proud that they "get it done".

Shannon is particularly impressive and should be seen as a future leader moving up at SLCC.

They identified the following challenges:

> They need written procedures and training information. It is challenging to stay current with changes to curriculum and college procedures by being remote from the main campus. They cannot always leave their posts to attend the monthly Enrollment Services' trainings.

Satellite campus staff is often excused from the monthly Enrollment Services' meetings at a certain point and this does not feel inclusive and welcoming.

Having a chat system for the Satellite directors to use with MaryEtta and her staff would help facilitate training and connections.

Program Review Team Suggestions:

Use Lane's "Y" fee concept to collect transcript fees when Cashier Office is closed. See Appendix for details

Utilize video chat to support students and each other.

SLCC owns the software from Intelliresponse, which is named AskSLCC. This could be used to put information out for staff and students as a resource for training. Recommend utilizing a version for external customers and another for implementation as an internal FAQ tool. See Appendix for details.

Helen will suggest that MaryEtta consider sending a periodic Enrollment Services Update like Helen uses at Lane CC to campus faculty and staff, who can also ask to subscribe to the email group. This can be used to summarize major points from monthly Enrollment Services meetings and to provide updates on policies, procedures and system changes.

It is not clear as a visitor to Student Services what services they provide. By installing a large screen TV in the lobby and running an easy PPT through this they can both advertise their services and provide reminders and updates.

The lobby at the Jordan Campus was filled with computers. They could create screen saver messages displaying important updates and reminders for the students.

The Program Review Team pointed out that it is hard to find them on the college website, unless you know to specifically search on their name. Currently the students are referred to Enrollment Services links instead of to the services at the satellite campuses.

Staff could use Google chat to communicate faster than with emails.

We recommend providing video cameras (good ones cost only $40 ish) to enable video chat support – for each other internal to ES as well as with customers.

With your Nolij implementation, you could scan documents at the satellite campuses but have your back end team process them. You could also use workflow to have the documents routed to the 'right' locations/owners. This keeps consistency with processing, but adds customer service on the front lines.

Student Panelists

Issues discussed:

Applying for graduation was "so stinking easy".

Would like to be able to pay graduation fees online.

One student with limited English skills had a very hard time applying and understanding instructions.

Two students were very upset that their program advisors moved to another department. Said that your advisor in your lifeline.

None of the students knew what Student Express was.

They never heard of AskSLCC.

Search box on the website is a joke. Takes you to articles from departments. Use the A-Z tool instead.

Loved the online orientation.

One student was very frustrated with prior credit evaluation and could not have his Math class credit articulated in time to meet the prerequisite so he did not attend before.

Student Express students liked the personal attention they received and that it gave a foundation for everything else

The students were incredibly happy with the service provided by SLCC staff. They felt the staff cared.

One student continued to talk about 'Tilly' and how amazing she is. "Tilly held my hand" he said. This student is taking one more class at SLCC, but has started at the University of Utah. He comes back to SLCC to get

help from 'Tilly'. He's a loyal Bruin and will recommend SLCC to anyone because of her!

Another student highlighted the role the Horizonte program had in her attendance. She "wouldn't have figured out how to be admitted or registered if it weren't for them."

Students had concerns about transfer from the SAT to SLCC. "Isn't it the same school" one asked.

Students felt advising should be mandatory.

Veterans/Aviation Program

Both Health Admissions and Veterans were mostly pleased with the services provided by the Incoming Transcript Office.

Issues discussed:

Transcript evaluation practice—once transcripts are received the evaluation process works very well for both Health Admissions and Veterans/Aviation Program.

Program students have a hard time finding the Incoming transcripts office as well as understanding their responsibilities with regard to requesting transcript delivery to SLCC from their original institutions.

Program Review Team Suggestions

Based upon input from Health Science Admissions and Veterans/Aviation Program, perhaps web resources can be better utilized to advise students on being proactive and expediting transcript requests from original institution(s)

Office of Information Technology

Issues discussed:

The first comment made by the OIT staff was to reflect on the solid relationship between OIT and ES. They said staff in ES was very patient and tolerant and that any recent strain was not from relationships, but from pressure to drink from the fire hose.

The new mandates from administration are putting pressure on both sides to make things happen and OIT resources are limited compared to similar institutions. They used to be a "Mom and Pop" operation as a small technical school, but now they are a bigger organization handling a large volume of projects. They are now a large institution, but with pockets of "Mom and Pop".

Enrollment Services is the largest "customer" for OIT and has a legitimate need for OIT's assistance with technical projects, but OIT does not know their work to be able to just hear a need, determine a technical solution and to know that it is going to meet the business practice.

The current culture is that OIT supports and assists in creating solutions to business problems in ES and while they do not want ES to take over the OIT role, they need someone in ES to shepherd the various projects, provide a prioritization for these, identify the desired deliverables and to guide them through the solution process.

The programmers/developers do not have time to sit in on seven different meetings listening in on what is needed. They need a point person who can present the needs in an organized method, describing what is needed and providing input on the resolution.

They are trying to react to a project list with twelve #1 priorities and there are multiple lists. Who oversees these lists and who decides the true priorities? Without one master project list that is being managed whoever swings the biggest hammer wins.

It does not seem that anyone is taking into consideration the return on investment with the time they spend on the different projects and there are not enough programmers/developers to meet the demand.

ES could reduce the frustration with the list with multiple priorities by providing one liaison to OIT and no longer allow anyone in ES to approach OIT staff. They would need higher-level support from Deneece that this new ES liaison is the voice to OIT.

Their second biggest customer is SAT and they are taxing resources in OIT to serve 700 students, because they are not using Banner delivered solutions for their business needs.

The purchasing of more and more third party products is putting a burden on OIT. The support innovation, but the way the requests come to their attention is not working.

There is a residual effect of the prior decision to outsource OIT to Collegis and many staff in OIT still feels like second-class citizens as a result. They often feel like their opinions do not matter as much as the need to have the work done.

The battle ranges on and the battle is constantly changing with new movements and strategies changing on a dime. They need a better strategy to be able to respond to these oncoming requests and to be deliberate in their delivery mechanisms.

The requests that are coming to them from ES and especially those related to Ellucian's Banner software requires training and they need more of this. Banner uses Oracle forms and these are becoming antiquated, but the programmers and developers still need to use this.

The DegreeWorks implementation was a model project. OIT was told about it in advance and the administration made this a clear priority. OIT said that they would need another DBA and another developer and a project coordinator and Rebecca was brought in for this. The implementation of DegreeWorks was presented to the OIT Steering Committee; it was vetted and moved to the Executive Cabinet who approved it. It has proper structure right out of the gate with high-level sponsorship and was resourced appropriately. This project is going really well.

Program Review Team Suggestions

Clearly OIT is supporting the message from the ES units that runs throughout the self-study and the interviews. There are too many demands, not enough coordination and management of these demands from ES and the expectations on OIT with limited resources is, too high.

We have already suggested that a management position in ES become dedicated to coordinating technological needs, to scope the projects, explain the business practices to staff in OIT and to assist with the prioritization of the work project list.

We did not have an opportunity to meet with the CIO, but there seems to be a need for direction from a higher level and a sense that OIT is being seen and valued by central administration.

More training is needed to insure that the programmers/developers are up to speed on the technological solutions to the problems being presented and that they have the skill set to deliver.

Student Services

Issues discussed:

> We met with staff from Testing, Orientation and International Students and all three seem to interface with the Data Center the most and had high praise for this team. They all agreed that they need three "Joyce's".

> Test scores are uploaded into Banner in 15 minutes, but it can be up to two days before a student's application is processed and they can be seen to test. It would be so helpful to have more staff to help with data entry during the rush periods.

> The Orientation staff wishes there were more people in the Data Center to process the Admissions Update Form. Students want to be able to do this on line and they have to spend a great deal of time hearing from upset students.

> The International Student Services area would like an online International Admissions form so that they do not have to print out the applications and give them to the Data Center to enter. There are a number of issues that require them to work with the Data Center to resolve for a small number of students compared to the general population. If they could find technological solutions they would not have to be so reliant on the Data Center who they appreciate so who are very busy.

Program Review Team Suggestions

> Again, with the assistance of a technology manager the needs of Testing, Orientation and International Student Services, along with any other Student Services area could be addressed, triaged, researched and perhaps delivered.

Lane CC ESFS Update sample

From: Helen Garrett
To: ESFS UPDATE 2012
BC: Helen Garrett
Subject: Enrollment and Student Financial Services Update

Thursday – February 21, 2013 2:15 PM

Greetings Everyone,

How crazy that we are already on the 7th week and spring flowers are starting to appear!

Here are many updates for you.

1. Enrollment and Student Financial Services Frontline and Phones closed Friday, February 22nd and March 14th
2. Managing Post Banner/myLane Upgrade Challenges
3. New multi-year planning calendar
4. Veterans Services' changes
5. Request to not refer students directly to Darlene Baker, Margaret Kimble and Todd Matson
6. Help text for passphrase issues in myLane
7. FERPA Tip on Under 18 students

1. Enrollment and Student Financial Services Frontline and Phones closed Friday, February 22nd and March 14th

The Enrollment Services Advisors' Team will be participating in two professional development days, February 22nd and March 14th. myLane Lobby Assistants will be available to help students with self-services on both days.

2. Managing Post Banner/myLane Upgrade Challenges

As has been widely advertised, IT is managing a system upgrade Friday, February 22nd at 2 p.m. through Monday, February 25th at 7 a.m.

The Banner Student Module Core Team has been widely testing and preparing for the upgrade, but it is possible that unexpected challenges might occur.

If you run into unusual challenges with your normal Native Banner or self-service processes starting Monday, February 25 at 7 a.m., please do not contact the IT Help Desk, but e-mail Darlene Baker at bakerd@lanecc.edu. She will specifically be looking for these e-mails all week long.

The Enrollment and Student Financial Services Update is created and sent out by the registrar when there are issues of importance to share. This is typically every two to three weeks.

Helen started this by creating a group in our GroupWise email system to admins, Student Affairs staff and IT colleagues when we were first implementing Banner in 2002 and 2003. As the popularity of this formatting, which is always the same grew, others on campus learned of the ESFS Update and asked to be added to the list.

We now have over 300 subscribers that depend on these missives. Some staff prints them off and others archive them electronically.

The success of this is that it has the items bolded at the top in brief so readers can scan for items important to them and read more details below. Helen has kept this up for 10 years now and it has not been a burden to produce.

Items of importance that are discussed at staff meetings fold into this, so that staff who were absent can catch up on what they miss. As a rule Helen never has more than 10 items in each issue to keep it brief and manageable.

Appendix C

Lane CC Banner Student Core Team description

Helen Garrett, Dean of Enrollment Management Systems (Registrar/Bursar) at Lane leads the Banner Student Core Team as the Data Custodian for the Banner Student Module. The team has met on the first and third Thursday of the month from 1-3 p.m. since June of 2003. It serves as the advisory group to the Data Custodian and is the reason we have been a leader among community colleges in Oregon for implementing new technologies efficiently and effectively.

We are an open meeting and serve to learn of needs on the campus for the Banner Student Module, respond to challenges and set the prioritization and timing of projects.

We build a quick agenda by doing a round robin at the start of the meeting. The meetings run efficiently by addressing major issues and assigning sidebar conversations and follow up ones outside of the meeting to report back at the next meeting.

We use email in between for important announcements and notes are maintained of the agenda and key decisions.

Here is the make up of the team:

- Chair (Dean of Enrollment Management Systems, manager, Enrollment and Student Financial Services)

- 2 Banner Student Module System Coordinators (classified, Enrollment and Student Financial Services)

- Chief Information Officer (Executive Team, manager, Information Technology)

- Executive Dean of College Transfer (Executive Team, manager, Academic and Student Affairs)

- Institutional Reporting and Assessment Director (Executive Team, manager, Institutional Research and Assessment Planning)

- Curriculum and Scheduling (classified, Institutional Research and Assessment Planning)

- Programmer/Reporting (classified, Institutional Research and Assessment Planning)

- 4 Programmers (Webmaster, Portal master, Academic History, Accounts Receivable, classified, Information Technology)

- Counseling (faculty, Counseling and Advising)

- High School Connections (like SLCC's Concurrent Enrollment) (classified, High School Connections)

- Department Admin (classified, Language, Literature, and Communications)

- Financial Aid Director (manager, Enrollment and Student Financial Services)

- Financial Aid advisor (classified, Enrollment and Student Financial Services)

- International Admissions (classified, International Admissions)

- Student Records Specialist (classified, Enrollment and Student Financial Services)

- Degree Evaluator (classified, Enrollment and Student Financial Services)

- Student Success Director (manager, Academic and Student Affairs)

Appendix D

Lane CC "Under 18 Student/Parent Consent Form"

Credit students under 18 need to complete the "Under 18 Student/Parent Consent Form" to enroll. Students in our High School Connections (dual enrollment) programs complete this as part of their online application process using the Banner QuickStart admissions' tool.

Students must retrieve the consent form, read and submit it to Enrollment and Student Financial Services. They have two holds placed on their records at the point of admission, one for Under 18 that expires on their 18th birthday to satisfy financial aid requirements that students under 18 are not regularly admitted and the second is a hold for this form to be submitted before they can register.

Students in the High School Connections program may give consent for parents to access their enrollment information (not grades/attendance) through our Banner Student Information Release (see Appendix E). We provide high school staff with a look up tool to look up L numbers. (see Appendix F).

Link to instructions for Under 18 Admissions http://www2.lanecc.edu/esfs/under-18-students

Form is at http://www2.lanecc.edu/sites/default/files/esfs/under18consentform.pdf

Appendix E

Lane CC Banner Student Information Release Form

In order to provide a secure method by which students could ask for an opt out of the Directory Information release per Lane's FERPA policy and to provide a password to provide for specific information to be released we developed a tool called the Student Information Release accessed through our portal, myLane.

Students must use their "L" student identification numbers and passphrase known only to them to log into myLane to access the Student Information Release form.

They can use this to place a confidentiality hold on their records or to remove this as often as they wish. They can also provide a password that they can share with anyone they want to have access to specific information identified below.

Here are screenshots of this tool. Lane will share this with SLCC if interested.

Start by clicking on the "Student Information Release" in the Student Records' channel:

Students then review what is in place in terms of a confidentiality hold being in place or not and either add it or remove it.

They can also provide a password that loads into the comments section of SGASTDN to be review by college staff when college to verify that they can release specific information to the caller presenting the exact password.

Enrollment and Student Financial Services	Financial Aid	Faculty & Services	Advisor	Employee Services	Personal Information	Financial Information	Main Menu	Staff Services	Admin

RETURN TO STUDENT RECORDS MENU   SITE MAP   HELP

Student Information Release

L00001652 Helen B. Garrett
Mar 20,2013 12:10 am

IMPORTANT: Before making changes to your information release status please read the Student Information Release Disclaimer.

1 - Directory Information Click here for a listing of Directory Information.

Your Current Status is:
Lane Community College **MAY** release your DIRECTORY INFORMATION.

Change my current status:
[Restrict Directory Information] **I hereby restrict my DIRECTORY INFORMATION:**
Absolutely NO information will be released except to individuals who have your current password, or unless you appear in person and present photo ID. This restriction will remain in effect unless otherwise amended by you and does not affect any information previously released.

2 - Additional Information

To facilitate services to you, you may wish to establish a password that would allow the College to release admission, financial aid, and financial information to you and others who know your password.

Current Password is:	No password at this time

Information that will be released to those with the password and what will not.

Types of Information

Types of Information that WILL be released with a password:

REGISTRATION	FINANCIAL AID	FINANCIAL TRANSACTIONS
class drop dates	status of application	charges
class name	student budget amounts	payments
number of credits	enrollment level information	credits
period of enrollment	types of awards	
degree awarded	award amounts and status	
date degree earned	student satisfactory academic progress status	
honors	Stafford loan lender	
major field of study	default or repayment information	
date graduated		
number of credits earned		

Types of Information that WILL NOT be released:

REGISTRATION	FINANCIAL AID
Grades	parental information
transcripts	
class time/location	
passwords	
PIN numbers	
student ID numbers	
GPA (grade point average)	
residency status	
address and phone number	

Close Window

Lane CC Student Number Look Up tool in portal

We provide high school staff that assists Lane Community College with our High School Connections' classes (like Concurrent Enrollment at SLCC) with an "L" number look-up tool in myLane/Banner so they can look up student's "L" numbers in the high schools.

They receive FERPA training and know that they are to only use this to help students in the high schools who cannot remember their "L" student identification numbers.

Here are some screenshots from myLane, our student and staff portal showing how to access this tool. They begin by clicking on the "Staff Administrative Menu".

| Enrollment and Services | Student | Financial | Financial Aid | Faculty Services | & | Advisor | Employee Services |
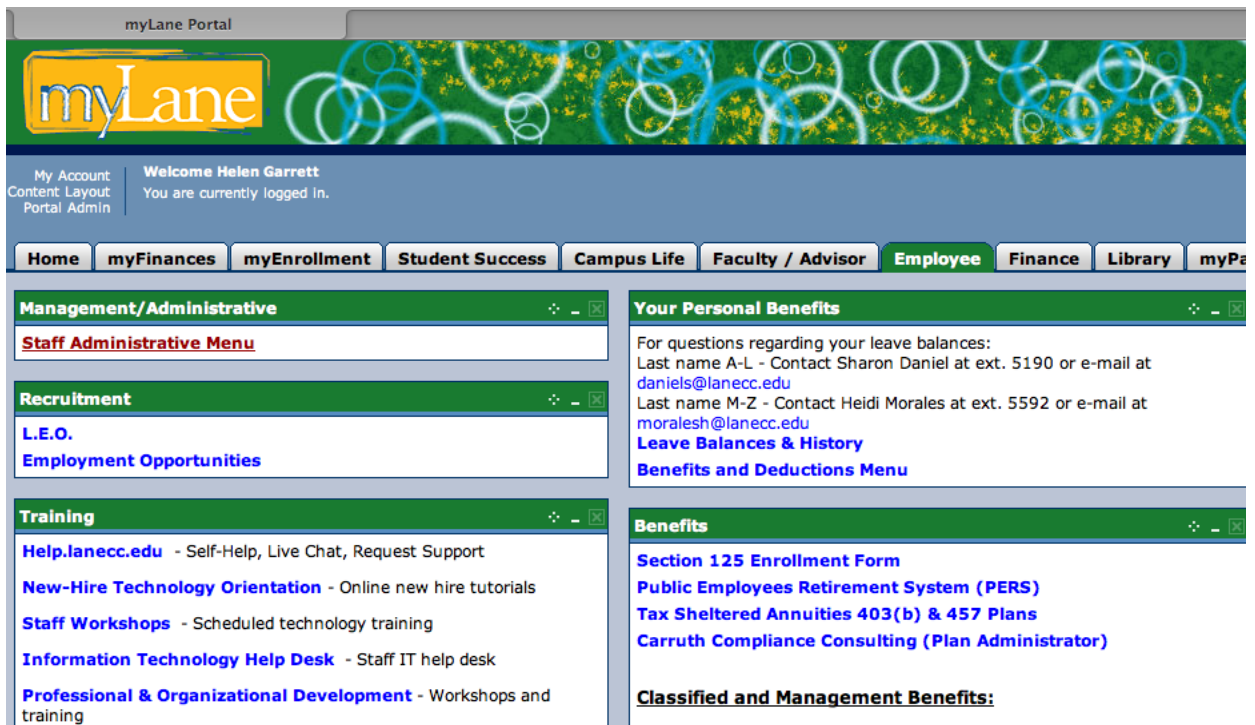
Staff Administrative Services Menu

ⓘ This menu provides access to special staff administrative services that have been assigned
will see this page.

Check Student Activity Eligibility
   Checks current term only.
Check Tech Fee Status
Class Lists for Department Admins
Check Bus Fee and Assign LTD Sticker
L Number Lookup by Name and Birthdate
Employee Evaluation Tracking
County Code Lookup Tool
Bookstore Charging Eligibility Check
Verify Student Employment Eligibility
ID Selection (Admin)
When Can I Register? (Admin)
Use ID selection first.

RELEASE: 8.5.1

myLane

Back to
Employee Tab

| Enrollment and Student | Financial | Financial | Faculty & | Advisor | Employee |
| Services | | Aid | Services | | Services |

L-Number Lookup by Name and Birthdate

Enter Last Name: Garrett

Enter Birthdate (MM/DD/YYYY): 05/23/1994

(Submit)

RELEASE: 1.0.0.0

myLane

Back to
Employee Tab

Enrollment and Student Financial	Financial Aid	Faculty & Services	Advisor	Employee Services

L-Number Lookup by Name and Birthdate

Enter Last Name: Garrett

Enter Birthdate (MM/DD/YYYY): 05/23/1994

(Submit)

Name and ID Information

Person Name	L-Number	SSN
Melissa Garrett	L00489464	xxxxxNONE

Check Tech Fee

RELEASE: 1.0.0.0

<u>Appendix G</u>

<u>Link to Lane's Program of Study Wizard tool</u>

Lane Community College has historically had the situation where we have no idea what Program of Study/Major our students really think they are in. Until now, you could have one Program of Study (POS) in Banner SGASTDN and when it was time to apply for graduation or submit a financial aid credit limit appeal you could just pick a new POS and no one would even change what was in Banner or check to see if it was the same.

This has not only created a nightmare for Institutional Reporting; but we could not track what POS students were in for advising purposes.

So, using the Moodle quiz module, a faculty counselor developed a robust question and answer tool for students applying to Lane, reapplying after a year's absence and those changing their Program of Study in myLane, our student portal for students to use.

We now require students to keep their POS updated in myLane and when they submit a financial aid credit limit appeal or apply for graduation we tell them that we will use the POS in Banner/myLane.

This tool debuts at Lane on Monday, April 1st, so the link is not yet, live, but it will be accessible to the public by clicking on the Apply and Enroll link (on our brand website debuting on March 24th!). We are piloting this for spring term, giving students a choice to try the Program of Study Wizard and it will be required starting summer of 2013.

Here are a few screen shots to give you a sample of what it looks like:

Lane
Community College

Home   LaneCC Home   Students   Faculty   Academic Advising   Site News

Home ▸ My courses ▸ Program of Study ▸ Start Here ▸ Program of Study Selection Wizard

Edit page conte...

Program of Study Selection Wizard ⓘ

Preview   Edit   Reports   Grade essays

Settings ⊟

▼ Lesson administration
  ☐ Edit settings
  ☐ Locally assigned role
  ☐ Permissions
  ☐ Check permissions
  ☐ Filters
  ☐ Logs
  ☐ Backup
  ☐ Restore
  ☐ Preview
  ☐ Edit
  ▸ Reports
  ☐ Grade essays
▸ Course administration
▸ Switch role to...

Welcome to Lane's Program of Study Selection Wizard!
Students with portable devices (phones, tablets or iPads) may have difficulty viewing some of these pages.

If any page has wording that is too small for you to read, please do the following:

- PC users select "control" and "+"
- MAC users select "command" and "+"

Make a MAJOR decision

Program of Study Selection Wizard ⓘ

Preview   Edit   Reports   Grade essays

Settings ⊟▯▮

▼ Lesson administration
  ☐ Edit settings
  ☐ Locally assigned roles
  ☐ Permissions
  ☐ Check permissions
  ☐ Filters
  ☐ Logs
  ☐ Backup
  ☐ Restore
  ☐ Preview
  ☐ Edit
  ▸ Reports
  ☐ Grade essays
▸ Course administration
▸ Switch role to...
▸ My profile settings

Navigation ⊟▯▮

Home
  ☐ My home

Lane's Degree and Certificate Options:

You are not required to earn a degree or certificate at Lane, but if you wish to use financial aid to assist with your college costs, you must pursue a financial aid eligible degree or certificate program. Below we have listed Lane's degree and certificate options - notice not all are eligible for financial aid.

- **Associate of Arts Oregon Transfer** (AAOT) Eligible for financial aid - The AAOT is chosen by many students who plan to transfer to one of the Oregon University System (OUS) four-year institutions. It allows a student to meet the first two years of general education requirements and to achieve junior level status upon admission.

- **Associate of Science Oregon Transfer - Business** (ASOT) Eligible for financial aid - Chosen by students who plan to transfer to one of the OUS four-year institutions with a major in business. It allows students to meet the first two years of general education requirements and to achieve junior level status upon admission.

- **Associate of General Studies** (AGS) Eligible for financial aid - This is our most flexible program, designed for students not pursuing a specific transfer or professional program. This is a solid choice for students who want to earn a degree from Lane that they can tailor to their educational needs. While this degree offers great flexibility in choice, it will not meet transfer requirements at the OUS four-year institutions.

- **Associate of Science** (AS) Eligible for financial aid - For some transfer majors, the AS best matches some pre-major requirements of four-year colleges and universities. It does not clear the general education requirements or assure junior level status at OUS four-year institutions, but is a solid choice for students who know they want to transfer to a four-year institution after earning a degree from Lane.

What is your goal in taking classes at Lane?

○
I do not want to complete a degree, one-year or two-year certificate at Lane; and I do not plan to complete credits to transfer to another institution. Note: Non-degree seeking students are NOT eligible for financial aid.

○
Return to previous page

○
I plan to only complete a **Career Pathways Certificate**.

○
I want to complete one of the following options:

- A One-Year Certificate at Lane
- A Two-Year Certificate at Lane
- A Two-Year Associate degree at Lane
- Complete coursework to transfer to another educational institution

Submit

Appendix H

Link to Lane's College Online Policies and Procedures tool

Lane Community College has a repository of policies and procedures that is on our website and open to the public called College Online Policies and Procedures (COPPS).

This is how we post Enrollment Services' policies and procedures and we set up links in our AskLane, Intelliresponse tool that take them to the appropriate policy or procedure on COPPS.

The link is http://www2.lanecc.edu/copps

The search tool will take you to any subject and will bring back policies and procedures for the entire campus and all of our processes.

If someone wanted to know, for example, the policy regarding animals on campus they could enter in animals and two policies appear.

Here is a sample of the directory.

Appendix I

Explanation of Lane's "Y" fee process to collect fees with a CRN

Enrollment and Student Financial Services is a one-stop shop at Lane Community College. We are admissions, registration, the Business Office, graduation and financial aid's front counter.

We wanted to move away from our staff handling cash, so we created an easy system in Banner registration where students would be given a CRN for a "Y" fee course to be able to obtain materials like art supplies and to check out graphing calculators.

The department creates a course in Banner that does not appear on the transcript called a "Y" fee course. They place a fee on the "course" such as $35.00 for a Graphing Calculator rental. Students are given the CRN each term and use the registration tools in myLane, Lane's portal, to register for the course.

Staff can then look on their registration and see that they have this CRN on their schedule and can provide them with whatever the "Y" fee represents.

We are mentioning it here, because we heard that the Jordan Campus Cashier is not always available for students to submit transcript fees and this would be a way for students to charge these fees without having to submit cash.

The Registrar's Office would then see that the $5.00 was charged to their account and could release the transcript.

We do not allow students to charge transcripts at Lane and require them to pay for them when they are ordering them through the Banner transcript request process, which is another method by which you could manage this transaction.

<u>Appendix J</u>

<u>Information on how Lane uses AskLane to provide training</u> <u>resources for faculty,</u>
<u>staff and students</u>

Lane Community College students, faculty, staff and the public use our AskLane,
Intelliresponse's software 24/7 to look up questions they have on thousands of
topics at Lane.

We encourage staff to present questions on the tool and if there is not an answer our
student interns and AskLane staff coordinator researches and create a question and
answer for the tool.

We read in the self-study and heard during our site visit that there were
communication challenges for staff and students who did not know answers to
commonly asked questions. We also heard that Enrollment Services seems to be
the repository for the entire campus to call and to be reminded of information, such
as "When is the last day to drop classes?".

SLCC owns Intelliresponse and has AskSLCC on your home page, but it is not
known to students and staff and seems to not be used in this manner.

We would strongly encourage Enrollment Services' team members to partner with
your Marketing and Public Relations' staff who manage this software to enhance the
use of this powerful 24/7 tool.

We literally have 1000's of questions answered around the clock which no longer
take staff intervention.

Our favorite aspect of this tool is the top ten questions list on the right hand side.
This displays the top ten questions asked in the last hour and is a powerful tool to
know what your students, staff and the public need to know from you. It is a
fantastic way to gauge what issues are arising on any given day and to find out what
information is not easily accessible on your website.

The tool uses the same intelligence as Microsoft gaming systems and is intuitive.
For instance, if you type, "How do I get in?" it has been taught to bring back answers
on the admissions' process as well as the hours of operation for your school.

If users do not find their question and answer or are not satisfied, there is a place to
register this and this is sent to the administrator who can then build the answer. We
have significantly increased our ability to reserve in person and phone staff for
questions specifically related to a student's situation and send the general questions
to AskLane.

Finally, we no longer publish an email address for Enrollment Services, but instead send them to AskLane first. 90% of their questions are answered, but if they have personal questions or need more help they can find the AskLane@lanecc.edu email to use at the bottom of the tool.

If their questions are general and not yet built in the tool, we use the questions coming through this email to create new questions and answers.

Here is a sample question and answer:

Appendix K

Lane "When Can I Register Link"

Lane Community College debuted staged registration for students in the spring of 2012 and we need a mechanism to have students self-serve to know when they can register. We also wanted counselors and advisors to be able to easily assess when students can register.

SLCC may have a similar tool, but we wanted to show you what we were able to create in Banner to display in myLane, Lane's portal.

We added additional helpful information and are in the process of creating a similar look up tool to provide high-level financial aid information, as well.

They begin by going to the Student Status under the myEnrollment tab in myLane:
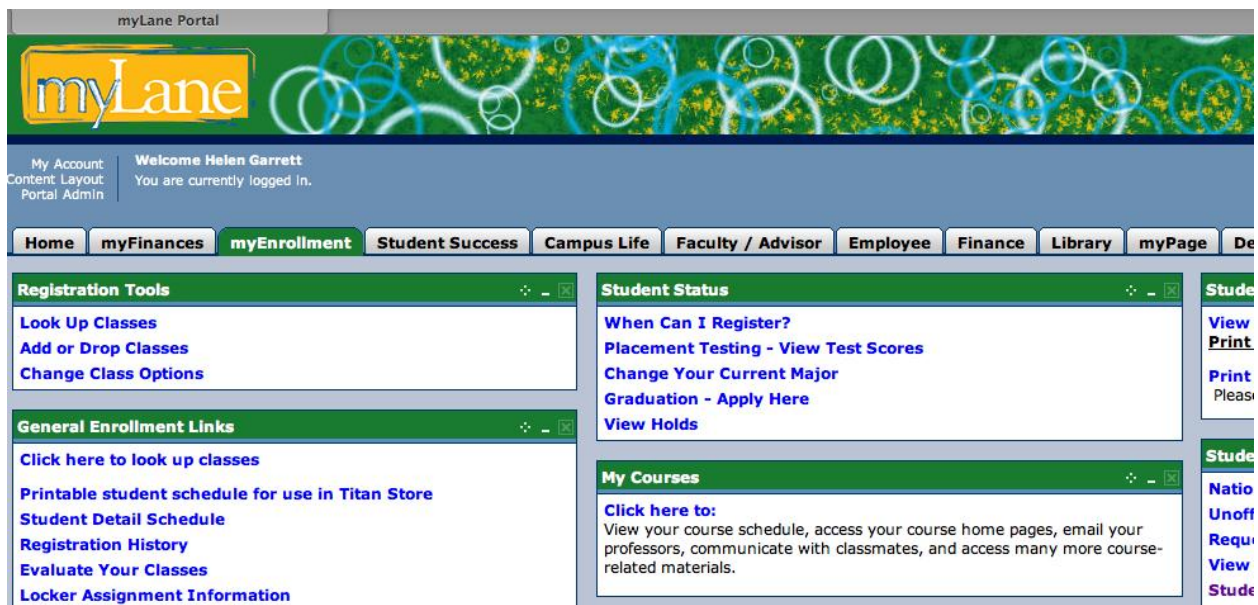
This is what displays, showing their time to register or any holds preventing registration:

myLane

◀◀ Back to
myEnrollment Tab

Enrollment and Student Financial Services	Financial Aid	Faculty Services	& Advisor	Employee Services	Personal Information

When Can I Register?

ID: L00001652 **NAME:** Helen Garrett _____ Spring 2013
All students whose registration date below shows "Not Cleared" can register during Open Registration.
Click here for registration information

Registration - Start Date : 14-FEB-13 **Time : 7:00 am**
If there are any messages in red below, you must resolve them before you can register.

Total Lane credits completed: 0

Admissions Status: Active
Admissions Level: Credit level

Program : No Degree_Not Declaring Major
WARNING: You cannot receive Financial Aid with this program