

# Enrollment Management Unit Summaries

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## UNIT NAME:

**Enrollment Management – Graduate Admissions and Recruitment**

## UNIT SUMMARY AND RESPONSIBILITY:

The Office of Graduate Admissions and Recruitment (OGAR) is responsible for recruitment initiatives and application processing to support and increase graduate and professional student enrollment. The unit works collaboratively with each college to develop recruitment strategies including in-bound marketing, digital advertising, social media promotion and recruitment events. OGAR sets policies and procedures to process applications efficiently and ethically for all graduate and professional students at West Virginia University.

## UNIT HEAD COUNT COMPARISON:

7 FTE

## UNIT BUDGET COMPARISON:

The Personal Services Budget for OGAR increased 7% from FY2022 to FY2023 due to university pay increases and some restructuring of positions. There was a 26% increase from FY2023 to FY2024 to account for the additional position created. That funding was provided by University Relations to pilot that position. OGAR's operating budget has remained unchanged since 2016 at \$124,000.

## UNIT BENCHMARKS:

OGAR operates with less staff compared to its Big 12 peer institutions. Almost all other Big 12 schools operate in a centralized model with a graduate school to oversee graduate admissions and recruitment. Our decentralized model creates challenges in providing consistent recruitment practices and applicant experiences. Although Eduventures; Adult Prospect Research showed a decline of 12% interest in master's degrees and four percent decrease in interest in doctoral degree, our admission trends have remained strong with a 31% increase in enrolled graduate students and 13% increase in enrolled professional students for Fall 2023.

## CONCLUSION STATEMENT / REVIEW OUTCOME:

The recommendation is to not reduce FTE or budget.

**UNIT NAME:****Enrollment Management – International Admissions****UNIT SUMMARY AND RESPONSIBILITY:**

This team is tasked with admitting all international Undergraduate and Graduate students to the University and working with these students through the various changing laws and requirements that come with the international admissions process. The team needs to stay on top of the educational system changes of up to 190 nations, including but not limited to credential evaluation methodology, English proficiency test verification, pre-and post-admissions communications, and more.

**UNIT HEAD COUNT COMPARISON:**

4 FTE

**UNIT BUDGET COMPARISON:**

Budget is included in overall Enrollment Management budget.

**UNIT BENCHMARKS:**

Compared to other schools this team has less staff than our Big 12 counterparts. The total combined International Undergraduate and Graduate applications reviewed, evaluated and decisioned for fall 2023 was 3,745, with only four staff members. For comparison, the total number of Domestic Graduate applications for Fall 2023 was 2,956, with a total of 8 staff. On top of processing UG an Graduate applications, this team also processes applications for PSC and will begin processing for Beckley fall 2024 without additional staff.

**CONCLUSION STATEMENT / REVIEW OUTCOME:**

The recommendation is to not reduce FTE or budget.

**UNIT NAME:****Enrollment Management – International Recruitment****UNIT SUMMARY AND RESPONSIBILITY:**

The International Recruitment team out of the Office of Undergraduate Admissions, focuses on UG recruitment of international students from 195 countries/markets. The work through the recruitment and enrollment cycle involves but not limited to; data market analysis (World vs US vs WVU) to determine markets of interest, planning of in-person and virtual recruitment events, vendor assessment for recruitment opportunities and services, outreach to international alumni, outreach to international parents, outreach to international counselors and US government officials involved in promotion of higher education, international marketing material creation and distribution, oversight of international ambassadors team, sustained communications with students to facilitate completion of application, proper submission of transcripts and English proficiency scores, tracking of weekly enrollment data including i20 issuing data, periodic expenses reconciliations, report building and assistance to international evaluations teams, reviewing scholarship applications for the Office of Global Affairs scholarship, supporting the Domestic Recruitment team and Visitors Center where we give weekly admissions presentations to domestic audiences.

**UNIT HEAD COUNT COMPARISON:**

3 FTE

**UNIT BUDGET COMPARISON:**

Budget is included in overall Enrollment Management budget.

**UNIT BENCHMARKS:**

All 3 staff professionals operate with salaries below the average market salaries for their respective positions. The unit operated with expenses significantly less than other units involved in recruitment yet manages such budget to cover the entire world. This unit total expenses are far less significant than those by other Big 12 competitors such as Iowa State and University of Cincinnati with much heavier investment in international footprint for recruitment.

**CONCLUSION STATEMENT / REVIEW OUTCOME:**

This unit is fully aware of current institutional budget restrictions and has not participated in any major professional development conferences since 2022. The unit has also reduced the expenses on marketing material and has not seen any major salary increases. This team also operates assisting domestic recruitment with in person presentation weekly as well as general support to office needs. The recommendation is to not reduce FTE or budget.

**UNIT NAME:****Enrollment Management – Technology****UNIT SUMMARY AND RESPONSIBILITY:**

The team develops and maintains the technology and operational framework used by the enrollment management teams across the WVU system including the Morgantown, Beckley, Keyser, and WVU Online campuses, the academic colleges, and the Honors College in support of enrollment initiatives at WVU. Team leads and supports business areas in the use of Salesforce CRM and ancillary systems to achieve the recruiting and admission goals of WVU and provides business process analysis expertise to ensure teams are optimizing resources.

**UNIT HEAD COUNT COMPARISON:**

5 FTE; 1 fewer from FY2022

**UNIT BUDGET COMPARISON:**

Budget is included in overall Enrollment Management budget.

**UNIT BENCHMARKS:**

Team is one of the most productive and knowledgeable within the division and on average is receiving and closing 136 requests for support every month.

**CONCLUSION STATEMENT / REVIEW OUTCOME:**

The recommendation is to not reduce FTE or budget. However, with Salesforce implementation, if budget becomes available, a digital/technology position – whether positioned within this team or UR-Digital – will help improve success.

**UNIT NAME:****Enrollment Management – Undergraduate Admissions and Operations****UNIT SUMMARY AND RESPONSIBILITY:**

This team facilitates all aspects of admission to create an engaging and seamless experience for incoming undergraduate domestic students. They constantly adapt to embrace new student initiatives, academic changes and recruitment goals. Goals, such as streamlining the change of campus process between campuses and quicker decisioning for admission decisions are goals that have been set and met. The team adapts to change quickly, to pivot to a new student initiative or enrollment goal.

**UNIT HEAD COUNT COMPARISON:**

18 FTE; 2 vacancies

**UNIT BUDGET COMPARISON:**

Budget is included in overall Enrollment Management budget.

**UNIT BENCHMARKS:**

Evaluate approximately 25,000 applications each cycle, generating \$800,000 in annual revenue. Without adding any additional salary lines, the Office of Undergraduate Admissions is now responsible for admissions at all campuses within the WVU system. Effective fall 2023. The Office of Admissions has less staff than our Big 12 counterparts, specifically in the areas of First Time Freshmen Domestic Evaluations, and International UG and Grad Evaluations. For example, Oklahoma State has 8 domestic evaluators and 3 international evaluators, as well as a team of student workers. WVU has 5 domestic evaluators and 2 international evaluators.

**CONCLUSION STATEMENT / REVIEW OUTCOME:**

The recommendation is to not reduce FTE or budget.

**UNIT NAME:****Enrollment Management – Undergraduate Domestic Recruitment****UNIT SUMMARY AND RESPONSIBILITY:**

The undergraduate domestic recruitment team is responsible for domestic first-time freshmen (FTF) and transfer (FTT) recruitment. They support change of campus, second-degree, and readmitted students, as well. The unit works remotely, and individuals reside in an assigned market. They travel up to six months per year attending college fairs, panels, information sessions, high school visits, and individual appointments. Included are large scale events such as national college fairs, WV Awards and College Decision Days, and change of campus workshops. They assist students and families through a variety of communication channels from the point of interest through application and onboarding. The undergraduate recruitment team also partners with WVU key recruiters, school and career counselors, and community constituents. In addition, they provide data related to the recruitment funnel and business processes.

**UNIT HEAD COUNT COMPARISON:**

15 FTE; 1 vacant; 1 PTE

Staffing benchmarks at peer institutions responsible for new domestic student recruitment: University of Pittsburgh – 26; Ohio University – 20; University of Maryland – 21; University of Tennessee – 20; Ohio State – 23; Oklahoma State – 22; Kansas State – 21; University of Cincinnati – 25

**UNIT BUDGET COMPARISON:**

Budget is included in overall Enrollment Management budget.

**UNIT BENCHMARKS:**

n/a

**CONCLUSION STATEMENT / REVIEW OUTCOME:**

The recommendation is to not reduce FTE or budget. If budget would become available, additional regional recruiters would allow for better saturation within our primary and secondary recruitment markets.

## **UNIT NAME:**

### **Student Financial Services - Compliance and Training**

## **UNIT SUMMARY AND RESPONSIBILITY:**

SFS Compliance and Training is a new unit that is imperative for the continued success and compliance of Student Financial Services and other units across the WVU systems who provide funding and reimbursements to students. Compliance and Training is constantly reviewing, interpreting, and providing guidance on the over 7000 rules and regulations associated with providing federal and state aid and applying those funds to students' accounts. We work to ensure that Student Financial Services (SFS) and other university departments are compliant with federal, state, institutional regulations by monitoring activities that affect financial aid, revenue management, and the sharing of private/sensitive data. We develop, plan, coordinate, and conduct training to ensure the SFS team and others across West Virginia University (WVU) campuses are informed and able to meet compliance and superior operational standards. Compliance and Training conducts periodic desk audits of processes within SFS to ensure that our established policies and procedures meet federal and state guidelines, and that staff are working in a compliant manner. We provide results of audits to SFS leadership and assist with the development of corrective action plans, if needed, and help to identify areas for additional training opportunities.

## **UNIT HEAD COUNT COMPARISON:**

4 FTE

The majority of our counterparts are dealing with only financial aid offices/issues. While we do not have specific numbers for other Big 12 institutions, we do know that the University of Arizona, Arizona State, Baylor, Brigham Young, University of Cincinnati, University of Houston, Iowa State, Kansas State, Texas Christian, and the University of Utah of individuals and/or teams designated for compliance and training.

## **UNIT BUDGET COMPARISON:**

SFS Compliance and Training does not have a designated budget. It is considered in the overall SFS budget.

## **UNIT BENCHMARKS:**

Over the last five academic years, Student Financial Services has processed and paid over \$2 billion in federal, state, and institutional aid. These funds turn earned revenue into operating cash. During the 2022-23 academic year approximately 77% of students attending WVU received some type of financial aid. Compliance and Training helps to ensure that we operate in a compliant manner. Failure to do so can mean fines in the \$100,000s and/or losing eligibility to receive federal aid funds. Through our outreach to campus partners, we ensure our constituents are informed of rules, regulations, and changes in processes that allow them to provide accurate and complete information to current and prospective students, and other interested parties. This helps to build confident, strong, sustainable relationships. The training, information, and guidance we provide allow our students and others to be confident that we are working in their best interests and providing effective services that allow them to focus on their educational opportunities.

## **CONCLUSION STATEMENT / REVIEW OUTCOME:**

With the ongoing extensive overhaul of the current federal financial aid process and increased scrutiny on protecting sensitive data, it is imperative that we continue to have a team focused on monitoring, reviewing, interpreting, and training on the ever-changing regulations. This allows for an informed and compliant team within SFS and across WVU campuses. We work to ensure that Student Financial Services (SFS) and other university departments are compliant with federal, state, institutional regulations by monitoring activities that affect financial aid, revenue management, and the sharing of private/sensitive data. We develop, plan, coordinate, and conduct training to ensure the SFS team and others across

West Virginia University (WVU) campuses are informed and able to meet compliance and superior operational standards. The recommendation is that there is no change in budget or FTE.



**UNIT NAME:****Student Financial Services - Revenue Management****UNIT SUMMARY AND RESPONSIBILITY:**

The Revenue Management team is responsible for the entire lifecycle of the student account - assessment (approximately 40% of WVU's revenue), billing, collecting, and moving all of those pieces into the General Ledger. We're also responsible for the recovery and reconciliation of all Federal, State, and WVU Foundation funds (roughly 2,300 MAP funds; \$230M was recovered, recorded, and reconciled in FY23). Lastly, we're responsible for all institutional and Perkins loan activity including but not limited to promissory notes, primary contact for third-party servicer (ECSI), recovery of funds from the Government, reconciliation of ECSI to MAP, liquidation of any unused programs including Perkins per the Department of Education mandate.

**UNIT HEAD COUNT COMPARISON:**

10 FTE; team decreased by 8 FTE in the last few years  
When compared to equivalent teams throughout the Big 12, the staff size ranges from 18-26 members.

**UNIT BUDGET COMPARISON:**

Revenue Management does not have a designated budget. It is considered in the overall SFS budget.

**UNIT BENCHMARKS:**

The Revenue Management team is responsible for efficient and accurate management of financial transactions and student accounts in both the General Ledger and Banner while maintaining compliance with university policies and regulations. All student transactions need to be recorded and billed accurately and timely for both student success and WVU brand management. All transactions feeding from the student system into the General Ledger need to be recorded and included on financial statements accurately and timely for 100% compliance ratings in each of WVU's audits and to support informed decision-making by university stakeholders. In FY23, we managed 100 fee assessment rules for all 3 campuses, assessed \$516M in tuition and fees, recovered/recorded/reconciled \$230M in Federal, State, and WVU Foundation funds, and assigned 2500 Perkins loans to the Department of Education as per their mandate.

**CONCLUSION STATEMENT / REVIEW OUTCOME:**

The Revenue Management team is the connection between academic units/program development and turning those programs into financial transactions. Likewise, we are the unit that takes all transactions in the student system and reports those in the General Ledger for operating costs/funds, budgets, and financial reporting. We have already been decreased in size due to budget constraints and various external circumstances. At this point, if we were to decrease our unit even by one person, we would lose accuracy, efficiency, and would be detrimental to the responsibilities as outlined. The recommendation is that there is no change in budget or FTE. If budget would allow, additional FTE would allow to better align with peers.

**UNIT NAME:****Student Financial Services - Strategic Operations****UNIT SUMMARY AND RESPONSIBILITY:**

The Strategic Operations unit manages platforms, data requests, mass communications, and batch processing for Student Financial Services for all campuses for financial aid, institutional scholarship, and billing and payment options. This unit has two teams that handle a variety of tasks including but not limited to managing federal files for the application and disbursement of financial aid, batch processing of financial aid and institutional scholarships, the communications planning and strategy for financial aid, billing, CRM management, and management of the Student Financial Services websites, chatbot, and social media. Through communications, this team helps to keep costs transparent and make college more affordable for students and families. This team processes data required to meet federal and state regulations.

**UNIT HEAD COUNT COMPARISON:**

10 FTE

Due to staff losses, they have lost high-level technologists and replaced them with entry-level team members, leaving a knowledge gap.

**UNIT BUDGET COMPARISON:**

Strategic Operations does not have a designated budget. It is considered in the overall SFS budget.

**UNIT BENCHMARKS:**

n/a

**CONCLUSION STATEMENT / REVIEW OUTCOME:**

The accuracy and speed with which financial aid and billing information has been made available for students and parents has increased significantly due to the planning, streamlining, and automation handled by this unit. We have implemented processes that other institutions only dream of, such as a thorough, tailored aid and billing communication plan to students as well as the significant feat of summer batch processing. We have utilized the tools available to us, maximizing what they are able to offer and catering it to our needs. This all directly correlates to meeting the goals of meeting federal transparency and compliance requirements as well as improving the student experience. The recommendation is that there is no change in budget or FTE, however, technology changes (e.g. Salesforce implementation) may need additional positions, if future budget would allow.

**UNIT NAME:****Student Financial Service - Student Aid Operations****UNIT SUMMARY AND RESPONSIBILITY:**

Student Aid Operations (SAO) is responsible for the timely collection and processing of financial aid including award entries, corrections, and processing of documentation while ensuring aid is offered, disbursed, and reconciled according to applicable federal, state and institutional rules, regulations and policies. SAO exercises professional judgment for extenuating personal or financial situations that have or may have an impact on a student's ability to pay or be academically successful. Processing of aid requires a high level of critical thinking since staff must know award criteria for thousands of types of aid and how those types of aid can be awarded in conjunction with others. Staff are required to learn tasks that require complicated steps to process on various operating systems and must have a general understanding of federal tax laws. Due to this complexity and audit requirements, most tasks require two team members to independently review for accuracy and compliance. Staff are required to compose and update policies and procedures on every process on at least a yearly basis. This is a time-consuming but necessary project to remain compliant with governing agencies. Staff also assist the WVU Hub with phone calls and tickets during busy times, ensuring the best customer service is provided to students and families. Staff within SAO work remotely and conduct business through Zoom, Teams, and email while using Customer Relationship Management Systems (CRMs), Financial Aid Management Systems (FAMS), and other third-party platforms. Over the past 5 years, the team has processed over \$2B in federal, state and institutional aid.

**UNIT HEAD COUNT COMPARISON:**

22 FTE; 5 positions are vacant – only 1 is being filled

**UNIT BUDGET COMPARISON:**

Student Aid Operations does not have a designated budget. It is considered in the overall SFS budget.

**UNIT BENCHMARKS:**

According to research conducted in November 2023, Baylor University who has a similar office structure and enrollment of 20824 as of fall 2023, has 26 staff responsible for the processing of financial aid.

**CONCLUSION STATEMENT / REVIEW OUTCOME:**

Student Aid Operations plays a critical role in assisting students in funding their educational expenses. With the significant changes to the federal financial aid formula and the delay in the 2425 FAFSA, accurate and timely processing of financial aid is imperative to matriculate and retain students. At the conclusion of this review, it was determined that further budget reductions would delay providing student financial aid offers resulting in students not being able to make an informed decision and/or not having sufficient funds to pay educational expenses. Furthermore, delays would have a negative result on net tuition revenue and the University's bottom line. The recommendation is that there is no change in budget or FTE.

## **UNIT NAME:**

### **Student Financial Services – WVU Hub**

## **UNIT SUMMARY AND RESPONSIBILITY:**

The WVU Hub is the connection to a number of offices including Student Accounts, Financial Aid, Scholarships, Academic Information and Federal Work-Study Employment for Morgantown and our Beckley and Keyser campuses. We have recently added Admissions to our area as well. The WVU Hub is the outward reaching team of SFS as it pertains to student services; including communications via phone calls, emails, walk-ins, zoom appointments and various outreach projects. We assist those who have questions concerning Financial Aid, Scholarship, Student Accounts and Billing, Federal Work Study, and Academic Information through the Office of the University Registrar. Our staff works as liaisons between our students, parents, alumni and other community constituents; and the SFS Home Offices and the Office of the University Registrar to ensure information is delivered consistently and accurately.

## **UNIT HEAD COUNT COMPARISON:**

- 19 FTE in Morgantown; 2 FTE in Keyser; 3 FTE in Beckley
- Adding 4 FTE from team previously identified as the Admissions Communications team.
- Student Workers as part of the Student Communications Center.
- WVU ranks 8<sup>th</sup> out of 11<sup>th</sup> in employee-to-student ratio in this area within the Big 12.

## **UNIT BUDGET COMPARISON:**

WVU Hub does not have a designated budget. It is considered in the overall SFS budget.

## **UNIT BENCHMARKS:**

Our staff is trained in a number of areas and must treat each contact with excellent customer service. In the past calendar year, we had 99,605 contacts via phone, email, walk-in and Zoom and performed an additional 120 in-person sessions for WVU FYE and other informative presentations, WVU recruitment events and off-campus Financial Aid nights and FAFSA completion events. During that same calendar year, we achieved customer survey ratings of 96% for email responses, 93% for phone calls and 94% from our walk-ins (all respondents who stated satisfied and/or very satisfied). In the past two years, we have added the One Stop units from Beckley and Keyser which required additional training and we are now adding the Admission Communication Team to the WVU Hub which will require additional training and outreach. The WVU Hub has been a leader in One Stops and had two presentations selected at our yearly conference for the Institute for Student Services Professionals (ISSP). I am also a committee member.

## **CONCLUSION STATEMENT / REVIEW OUTCOME:**

The WVU Hub is the connection for our prospective, current students as well as our alumni, WVU community and other constituents. Our team strives for excellent customer service and our constituents expect the same. There are times when we do require help from home offices during peak time. The recommendation is that there is no change in budget or FTE.