

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

Administrative Unit: Undergraduate Admissions

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PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their assessment plans, track progress toward goals, and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

SECTION 1: ASSESSMENT PLAN FOLLOW-UP

A key component of the continuous improvement assessment process is regularly following up on [your assessment plan](#). Please review your plan and select one-third of your unit goals, along with related desired outcomes and objectives to report on the progress made.

Selected Goal

Copy/Paste or enter the goal(s) from your unit plan that you wish to highlight and summarize.

Guide prospective students through their college search and enrollment process.

Desired Outcomes/Objectives

Copy/Paste or enter the desired outcomes and objectives connected to your selected goal that you will be reporting on.

2A. Admissions leadership will facilitate a minimum of four staff development trainings each year. These trainings focus on team building, time specific recruitment cycle preparation and refreshers, DEI, financial aid cross training, delivering excellent customer service, and other appropriate topics that foster skill and knowledge growth essential to being a highly effective Admissions professional.

2B. Admissions leadership will teach and implement territory management techniques to Admissions counselors. We will hold bi-weekly territory management meetings from mid-January to early August each year. The goals of territory management are:

- to consistently decrease the number of incomplete applications by tracking down missing items that will convert them to admitted students
- to facilitate effective management of the admit pool by attempting, completing, and tracking phone calls, to all admitted students, focused on discussing their financial aid package, answering questions, and building Accepted Student Day attendance
- to continue to empower the counseling staff to take ownership of their recruitment territories so they can make data informed decisions and are able to effectively communicate action steps supported by informed reasoning

Related Targets/Measures

Copy/Paste or enter the target desired outcomes and objectives connected to your selected goal that you will be reporting on.

2A. Admissions leadership and counseling staff will complete annual academic department, student life, and student services department catch-up meetings, and all appropriate training materials will be updated by September 15. Admissions leadership will facilitate or lead a minimum of four staff development trainings annually. Training topics will be determined through staff discussions, Admissions leadership gap identification, and solicitation of ideas from campus leadership at large. Staff development training effectiveness will be measured per the specific goals/outcomes of each training session. Staff feedback will be collected and documented, using Qualtrics, within one week of each staff development training session. Each year the goal is to have zero internal or external complaints about Admissions customer service delivery and staff knowledge. If Admissions is subject to any complaints or concerns, that will be documented by Admissions leadership and subsequent staff development training will target the desired improvement.

2B. Using the new undergraduate student enrollment goals determined by campus leadership and SUNY, Admissions leadership will use historical region (territory) enrollment numbers and yield percentages to calculate territory specific goals. This calculation will be completed by December 1 each year. Beginning mid-January each year, the Admissions counseling staff will complete and dissect biweekly "Territory Management" reports for Admissions leadership. These reports must contain action steps and targets per each two-week increment. This data analysis and reporting fosters continual staff development and effective team communication. Biweekly decreases in incomplete applications, completion of ready for review applications, and continual increases in completed phone calls and texts are all direct measures of successful territory management.

Describe the progress made toward the selected goal and the related desired outcomes and objectives. Be sure to include steps taken and any information/data collected and results.

2A. Prior to the fall recruitment travel season, Admissions completed thirteen department update meetings in September 2022. Those area updates: PACES; Secondary Education; Childhood/Early Childhood Education; Crane; Public Health & Human Performance; Center for Applied Learning; Art; Computer Science; Psychology; One Stop; Earth & Environmental Science; Anthropology; Women's & Gender Studies. These informative and discussion-based meetings facilitated Admissions staff and faculty interaction along with information exchange about department

updates that contributed to counselor training manual updates, specifically the academic bullets. There is a counselor identified as the point person responsible for managing counselor manual updates and subsequent staff notification. Department update meetings for August/September 2023 will start being scheduled soon.

Admissions leadership facilitated the following training sessions during the 2022-2023 cycle: FERPA (Stephanie Claxton), Financial Aid (Abby DeCastro), pre-fall travel updates and refresher training (Terry Francis, Erica Kaiser, and others), Territory Management (Terry Francis), various SLATE trainings (Karen Ahlfeld, Jayne Riley, and others), DEI (Dr. Richardson-Melecio), Admissions team trainings for newly formed teams covering International & Residency (Karen Ahlfeld), EOP (Erica Kaiser), Transfer (Karen Ahlfeld), Operations (Jayne Riley and Terry Francis), Next Steps Tutorials (Karen Ahlfeld). Training is ongoing, for both counseling and support staff. Our unit is strong when it comes to identifying training topics. There is room for improvement when it comes to formalized collection of feedback, beyond discussions with staff.

Admissions leadership is aware of two internal complaints and no external complaints in 2022-2023. Two complaints about the same Admissions employee, by other campus offices, were brought to the attention of the Director of Admissions. After discussions with the other office leaders and the Admissions employee, neither scenario escalated beyond those conversations. In one of the instances, the Admissions employee apologized for being short with a student worker in another campus office. Individualized staff development conversations are ongoing. They focus on positive reinforcement of exhibiting a calm demeanor, especially during moments of frustration. Admissions leadership was not made aware of any external complaints.

2B. The Director of Admissions implemented a revised version of Territory Management (TM), that was taught and utilized by a previous SUNY Potsdam Admissions Director. Territory Management involves predictive modeling, using historical data from previous years. An Admissions Territory Management Microsoft Team was created and utilized by Admissions Leadership and counseling staff. Two comprehensive training sessions were conducted, and TM calculation steps were documented. Counselors have been preparing and presenting biweekly TM reports. There has been tremendous staff growth since TM meetings began in January. Our inexperienced Admissions counselors are now thinking the enrollment funnel and cycle much more effectively than they were several months ago. This facilitated more efficient and thorough work on the Admissions funnel. Staff members are managing their territories knowledgeably and efficiently while also learning how to actively participate in other office functions, which continues to strengthen our team effectiveness and overall office culture.

Based on the assessment data and information shared above, what planned actions were or will be taken as a result?

2A. Admissions continually needs more high-impact information from other areas of campus. The Admissions team are trained generalists and rely on the most saleable information about everything SUNY Potsdam. In addition to department update meetings, the Admissions Director met with Provost's Cabinet to brainstorm strategies about more collaborative ways Admissions and Academics can partner to tell and demonstrate the SUNY Potsdam story. New student application and admit numbers were up significantly for fall 2023, but YIELD to enrolled is projecting to be

flat or slightly ahead of last year. Mock class Fridays, along with other experience Potsdam ideas are in the idea phase, with expedited planning geared toward getting things up and running in late October/early November.

Admissions will take the next evaluative step and institute Qualtrics surveys after each training session.

2B. Territory Management will continue in 2023-2024. Counselors will continue to refine their knowledge and skill with this process. This is continually discussed and informally evaluated by the Director of Admissions and Associate Director of Admissions. Territory Management contributes to staff comradery, as the counselors rely on each other for assistance in completing their biweekly reports. Accountability, autonomy, data analysis, predictive modeling, public speaking, are also essential byproducts of TM.

SECTION 2: ADDITIONAL ASSESSMENT ACTIVITY

Please use this space to share an example from this past year when you used assessment and data to plan and/or take action. Be sure to include any available information relating to the results and impact. Your example for this section does not need to be directly tied to your previously submitted administrative unit assessment plan.

The Admissions Events team used Accepted Student Day feedback from guests and campus stakeholders (faculty and staff), along with meetings with the three academic Deans, to make informed event adjustments. For example, faculty feedback indicated three time-blocks during the academic breakouts proved to be cumbersome, especially when it came time to facilitate student movement. We used the same amount of time and adjusted to two blocks. This decreased student and faculty confusion and facilitated a much smoother flow. We also decided to include a Dean Q&A session as the last session for family members. This went well. However, recent conversations are leaning toward building a more interactive family program, so they get a similar, interactive experience like their students. Admissions events always need to be scrutinized by campus stakeholders, so we can continually make them better. This will continue to be the model for continued improvement.