SUNY Potsdam
Administrative Unit
Assessment Plan

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PURPOSE
Administrative Assessment is an ongoing process that allows a unit to evaluate and – where necessary – improve its programs, services and operations. Assessment is a systematic approach to demonstrate continuous improvement in programs, services and operations. This template is to be used when creating your assessment plan. Assessment plans should be measurable, meaningful and manageable.

UNIT MISSION STATEMENT
The SUNY Potsdam Office of Undergraduate Admissions leads and supports the college in meeting its enrollment targets. Admissions recruits, admits, and enrolls undergraduate students who are a fit academically, show solid leadership and service skills, have a healthy respect for variety in the human experience, and are diverse on many levels.

GOAL #1
Reminder: Generally speaking, goals should be grounded in the mission of the unit, be broad, and linked to the overall institutional priorities and goals. They should focus on strengthening and improving critical functions, services and processes and reflect the most important/urgent priorities of the unit.

Provide accurate, timely, and useful information to prospective students and families.

GOAL #1 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply) ☒ Retention and Enrollment ☐ Financial Stability and Analysis ☐ Academic Programs and Planning ☒ Strengthening Community Connections ☒ Diversity, Equity, Inclusion, & Belonging	**Briefly describe the link between goal #1 and the institutional priority area(s) selected.** Effective communication is one of the most essential components of the new student enrollment process. Targeted marketing and communication also contribute to strengthening community connections. Multi-channel communication that demonstrates the diverse and inclusive environment at SUNY Potsdam is of utmost importance in enrollment management efforts.

GOAL #1 – DESIRED OUTCOMES AND OBJECTIVES

Tip: Outcomes and objectives should be SMART…   Specific, Measurable, Achievable, Relevant, Time-bound

1A. New/updated pubs (viewbook, postcard sequence, travel materials, etc.) will be designed, edited, and ready for production by June 15 each year.

1B. Admissions' SLATE email communication plan will be reviewed, updates and additions/deletions made, and ready prior to September 1 each year. There is always building being done, so this is a continual process, but the core of the COMM plan will be reviewed each summer.

1C. Targeted marketing campaigns will be reviewed by doing a three-year comparison of newly enrolled students from targeted geographic areas and in targeted academic program clusters by September 1. This annual review will continue as long as marketing funds are available.

GOAL #1 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

1A. In collaboration with College Communications, Admissions will complete a review of all publications (postcards, travel materials, viewbook…) to verify if updates are needed and to determine appropriate quantities needed. Completion and documentation of the review by June 15 of each year.

1B. In collaboration with College Communications, Admissions will complete a review of all SLATE COMM plans to verify if updates are needed and to make any modifications prior to the next recruitment cycle. Completion and documentation of an annual review and any modifications made by September 1 each year, with continual adjustments/upgrades being implemented throughout each cycle, if needed.

1C. In collaboration with College Communications and campus leadership, Admissions will participate in marketing strategy sessions led by the Vice President for Enrollment Management. Undergraduate Admissions will track marketing campaign effectiveness by using multiple measurables:
-   Annual increased prospective student attendance numbers at on campus events that were supported by newspaper advertising and social media boosts. This review and comparison with the prior year will be completed and documented by September 1 each year.
-   Annual increased undergraduate Admissions application numbers and enrolled students from geographic areas where physical and digital marketing campaigns are employed. This review and comparison with the prior year will be completed and documented by September 1 each year.
-   Annual increased individual and group campus visits by prospective students from geographic areas where physical and digital marketing campaigns are employed. This review and comparison with the prior year will be completed and documented by September 1 each year.

GOAL #2

Guide prospective students through their college search and enrollment process.

GOAL #2 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply) ☒ Retention and Enrollment ☒ Financial Stability and Analysis ☐ Academic Programs and Planning ☐ Strengthening Community Connections ☒ Diversity, Equity, Inclusion, and Belonging	**Briefly describe the link between goal #2 and institutional priority area(s) selected.** A versatile and well-trained Admissions team that can meet prospective students and families where they are facilitates the delivery of services needed to help them navigate the college search and enrollment process. An environment focused on exemplary customer service guides all enrollment planning and activities. This high-quality front-end experience builds relationships that impact each of the institutional priorities, certainly including those checked.

GOAL #2 – DESIRED OUTCOMES AND OBJECTIVES
Tip: Outcomes and objectives should be SMART…   Specific, Measurable, Achievable, Relevant, Time-bound

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

GOAL #2 – ASSESSMENT METHODS, MEASURES, AND TARGETS
Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

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.

GOAL #3

Maximize human and financial resources to increase yield opportunities across the enrollment funnel.

| GOAL #3 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply)

☒ Retention and Enrollment
☒ Financial Stability and Analysis
☒ Academic Programs and Planning
☒ Strengthening Community Connections
☒ Diversity, Equity, Inclusion, & Belonging | **Briefly describe the link between goal #3 and institutional priority area(s) selected.**

Strategic use of limited resources is key to helping a prospective student enter the prospect/inquiry pool and to keep moving through the funnel. Collaborative efforts involving stakeholders across campus are critical to building and implementing successful campus events, a new student merit scholarship program, and more. Increasing yield at each stage from prospect to enrolled, by a couple percentage points, will foster enrollment growth and support each institutional priority. |

GOAL #3 – DESIRED OUTCOMES AND OBJECTIVES

Tip: Outcomes and objectives should be SMART… Specific, Measurable, Achievable, Relevant, Time-bound

3A. The Admissions Events team will meet with the VPEM and Academic Deans at least twice annually to review prior year events, determine the number of on campus events for the coming cycle, and discuss any potential event modifications. These meetings will be completed and documented by July 15 and November 15, respectively. In connection with on campus events, Admissions leadership will work with internal and external sources to attempt to secure funding for two admitted student bus trips each spring semester. These bus trips will be in conjunction with on campus Accepted Student Day events. Funding and bus approval must be obtained by January 30. The desired outcomes from providing high quality on campus events and transportation for students that may not be able to visit campus without assistance: annual increases in event attendance at all Open House and Accepted Student Day programs; completely full buses for spring trips; increase number of enrolled students from geographic area connected with spring bus trips, typically 5 boroughs and surrounding area.

3B. Admissions leadership will collaborate with campus stakeholders to conduct an annual review of SUNY Potsdam's merit-based scholarship program for new students. The results of the review, in accordance with campus budget parameters, will determine the scholarship matrix and funding streams for the new cycle. The prior year review and new cycle scholarship program will be completed and documented by October 1 each year. The goals are to offer a fiscally responsible merit scholarship program that is competitive in the market and appealing enough to increase the yield of admitted to deposited (enrolled) scholarship students each year.

GOAL #3 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

3A. Increased collection of completed on campus event student and guest evaluations to inform decision making, an annual five percent increase in event attendance numbers, and an annual five percent increase in number of Accepted Student Day enrolled students, are ways Admissions will assess and measure on campus event programming effectiveness. Assuming bus trip funding and approval can be secured, the minimum annual admit to deposit (enrolled) yield rate target from spring bus trips will be 60-70 percent. Bus trip attendees will be surveyed about all aspects of their visit, within one week of each trip. This feedback, combined with various stakeholders' input, will result in continually improved programming and subsequent bus trip yield rates over 70 percent.

3B. Currently, the two funding streams for the new student merit scholarship program are cash and the on campus residential housing DIFR account. Cash scholarship admit to enrolled student yield is always significantly higher than housing-based scholarship funding. Since the current alternative to leveraging DIFR is to have a severely inadequate and non-competitive scholarship program, Admissions must maximize the housing scholarship yield rate to increase enrolled student numbers of scholarship eligible students. Annual Financial Aid package cross training, for the Admissions staff, will be completed the week after aid packages begin being sent to admitted students, which is typically late January or early February. After that training, Admissions staff will do admitted student phone calling campaigns February to April each year. All calls are logged for tracking and reporting purposes. Admission's annual goal is to complete admit calls to 100 percent of the admit pool. While that is the goal, 100 percent completion, defined as having conversations, is not realistic, unfortunately. Admissions does attempt and log admit calls to 100 percent of the admit pool. Multiple attempts are required, and the annual expectation is to complete more admit calls than the prior year.

Admitted scholarship students that have been sent financial aid packages are prioritized in round one of calling campaigns. These are students that added SUNY Potsdam to their FAFSA. This indicates increased interest over admitted students that have not added Potsdam to their FAFSA. Leveraging that interest

and their merit scholarship with targeted customer service-oriented phone calling is focused on increasing the yield of these students by five percent annually. Achieving this will necessitate the availability of increased scholarship funding.