Projected Enrollment:

<table>
<thead>
<tr>
<th>Fall 2019 Undergraduate Enrollment Projections*</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>First-Year Undergraduate Students</td>
<td>2,166</td>
</tr>
<tr>
<td>Transfer Undergraduate Students</td>
<td>1,324</td>
</tr>
<tr>
<td>Projected Total Undergraduates</td>
<td>3,490</td>
</tr>
</tbody>
</table>

*Final Fall 2019 numbers will be available after the add/drop period.

Preliminary FY 2019 Financial Aid Year End Reporting

Please note: These figures are typically reported in February following the fiscal year end. There are ongoing disbursements and reconciliation activities that occur between now and then.

Fund Snapshot

<table>
<thead>
<tr>
<th>Fund</th>
<th>Recipients</th>
<th>Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pell Grant</td>
<td>5673</td>
<td>$25,128,722</td>
</tr>
<tr>
<td>Subsidized Loans</td>
<td>6123</td>
<td>$24,333,899</td>
</tr>
<tr>
<td>Unsubsidized Loans</td>
<td>6781</td>
<td>$36,569,246</td>
</tr>
<tr>
<td>Federal Work Study</td>
<td>556</td>
<td>$1,600,500</td>
</tr>
<tr>
<td>Institutional Need Based Aid</td>
<td>5579</td>
<td>$25,983,036</td>
</tr>
<tr>
<td>Merit Based Aid</td>
<td>2,883 (duplicated)</td>
<td>$13,075,000</td>
</tr>
</tbody>
</table>

Financial Aid Applicant Snapshot: 2018-2019

<table>
<thead>
<tr>
<th></th>
<th>FAFSAs Rec'd</th>
<th>Selected for Verification</th>
<th>Pell Eligible</th>
<th>Average Family Income</th>
<th>Average EFC</th>
</tr>
</thead>
<tbody>
<tr>
<td>UGRD</td>
<td>11,759</td>
<td>32.3%</td>
<td>60.8%</td>
<td>$57,318</td>
<td>$8,634</td>
</tr>
<tr>
<td>GRAD</td>
<td>1,400</td>
<td>n/a</td>
<td>n/a</td>
<td>$48,392</td>
<td>$10,737</td>
</tr>
</tbody>
</table>

Important Notes from FY2019

- FAS anticipates the percent of need met in FY19 to be 83%. This is the result of the cost of attendance rising significantly. The incorporation of the residence hall and rising rent in the area have both contributed to this increase.
• Student Employment Services supported over 1,650 student employees in FY19. The majority of these students work on campus. Around 150 work for various non-profits in our immediate community.

• The Campus Living Grant was successful in helping ensure the first residential class at UMB was socioeconomically diverse. Overall, 45% of the first residential class had a Pell eligible EFC. The $1.4 million helped 230 Pell eligible students live in the residence hall. The students receiving a Campus Living Grant had a lower EFC and total family income than the Pell eligible students who did not receive Campus Living Grant funds.
Chancellor Goal 1. Budget

Enrollment Management Division Goals:

1. Increase incoming fall 2019 out-of-state enrollment (domestic/undergraduate) by 10%
   a. Conduct an analysis of out-of-state markets utilizing College Board and institutional data to help identify states and high schools to visit that are most likely to yield students.
   b. Based on analysis, expand overall out-of-state travel to targeted new and existing markets.
   c. Leverage the rebranded New England Regional Student Program in print and electronic marketing.
   d. Conduct targeted outreach to out-of-state students to promote Boston and new living opportunities.

Measures:
   a. Report on out-of-state will include the number of high school visits conducted and college fairs attended. A comparison to fall 2017 will be provided.
   b. At each phase of the admissions cycle, reports including historical comparisons will show the number of out-of-state prospects, applicants, admits and matriculated students.
   c. Report on the number of out-of-state students who attended major on campus events including Open House, Welcome Day I and II, Transfer Open House, etc.

Final Report:
The UMass Student Profile report for fall 2018 indicated that our out-of-state first year population was:
   o 171

The out-of-state transfer population was:
   o 50

Although final numbers will not be available until the end of add/drop in September, we anticipate meeting the 10% increase in fall 2019 out-of-state students based on the following:

First-Year:
   o 167 currently enrolled. 32 additional signed up for an upcoming orientation

Transfer:
   o 47 students currently enrolled. 30 additional signed up for an upcoming orientation

Out-of-State Freshmen Students
- Held more than 261 out-of-state recruitment events from September through November 2018 and in March 2019 in the following states:
  o Arizona
  o California (22)
  o Connecticut (64)
  o Florida (8)
  o Georgia (7)
  o Illinois (7)
  o Maine (17)
  o New Hampshire (38)
  o New Jersey (35)
  o New York (32)
- Rhode Island (26)
- Texas
- Vermont (2)
- Wisconsin (1)
- Mailed New England Regional promotional postcard to all New England prospects and guidance counselors
- Updated New England Regional Website
- There has been an/a
  - 18% increase in Early Action out-of-state and Regional Exchange (NERSP) applicants
  - 20% increase in Early Action out-of-state and Regional Exchange admits
  - 36% increase in out-of-state attendance at Open House

**Out-of-State Transfer Students**
- Developed contact records for Transfer advisors at New England community colleges
- Mailed Transfer marketing materials and letter to 40 campuses
- Lead generation-mined New England community college websites to identify over 2300 individual students
- Added 2,300 New England community college leads to CRM for email campaign
- Updated uAchieve with all current New England community college courses to ensure that Transferology is accurate and informative for Transfer prospects
- Identified five potential feeder schools and worked to align the most popular majors

2. **Develop partnerships and pathways for students from selected ESL centers in Boston**
   a. Establish stronger ties with English language centers in the Boston area by frequent visits and working with center leaders on pathways to UMass Boston for their students.
   b. Work with the English Department and our English as a Second Language program to review each center’s curriculum and testing methods to determine appropriate English proficiency levels.
   c. Host ESL center directors on campus.

**Measures:**
   a. Report on the number of English language centers visited and include an update on the pathways developed.
   b. Increase the number of enrolled students from ESL centers in Boston compared to fall 2018 data.
   c. Track the number of ESL center directors who visit campus.

**Final Report:**
Over the course of several months, Enrollment Management visited six ESL centers in the Boston and Cambridge area to discuss establishing a new pathway for their students to prepare them for admission to the University.

**New Pathways:**
- Will involve a new standard to determine English proficiency
- Will help students focus on the curriculum at their ESL centers
- Will eliminate a standardized test to validate English proficiency
ESL Centers Visited:

- FLS English Language School
  - The University’s English Department has reviewed the school’s curriculum and writing samples from students who are at a level 17
  - English Department has determined that a level 17 is equivalent to an IBT score of 79/80
  - FLS students who apply to UMass Boston will be able to submit their level 17 evaluations in lieu of the IBT to determine language proficiency

- ASC Boston
  - Has submitted writing samples from students who are at a level 5
  - The University’s English Department is in the process of reviewing the writing samples and will make a determination soon

- Boston School of English
  - Is in the process of gathering writing samples for their highest achieving students
  - Writing samples will be submitted to the University’s English Department in the coming weeks

- EC Boston
  - Is in the process of gathering writing samples for their highest achieving students
  - Writing samples will be submitted to the University’s English Department in the coming weeks

- The Academy at Harvard Square
  - Is in the process of gathering writing samples for their highest achieving students
  - Writing samples will be submitted to the University’s English Department in the coming weeks

- Stafford House
  - Is in the process of gathering writing samples for their highest achieving students
  - Writing samples will be submitted to the University’s English Department in the coming weeks

3. Increase the number of incoming new Veterans by 5% for fall 2019
   a. Increase tracking and marketing to prospective and current Veterans by implementing Salesforce Marketing Cloud and introducing recruitment journeys to this targeted audience.
   b. Create new digital and print marketing collateral tailored to Veterans.
   c. Hire a part-time Veteran recruiter to help with visits to community colleges and Veteran centers.
   d. Introduce new events and expand existing events (e.g., Welcome Home Breakfast) that host Veteran students on and off campus.

Measures:
   a. Successful implementation of Salesforce Marketing Cloud including electronic journeys that guide veteran students through the recruitment and admissions pipeline.
   c. Analysis of outreach efforts and recruitment events, including the number of Veteran students in attendance.

Final Report:
Our Veteran student population is largely transfer students and their admissions process continues throughout August. Although we are currently up by 34% in Veteran admits our deposit are down by 23%. Both the Undergraduate Admissions team and the Veteran Affairs team is working over the next 4 weeks to convert more of the admits to matriculated students and collaborated on the following initiatives throughout the year:
• Salesforce Marketing Cloud Implementation: this implementation took longer than anticipated due to contract delays and challenges with the external implementation consultant. The full benefits of this tool will be realized over the next recruitment year.
• Sponsored three major Veteran events
  o Celebration of Service
  o Veterans Luncheon with the Chancellor
  o Welcome Home Breakfast
• Placed recruitment ads in Veteran Publications
  o USA Today Special Edition
  o Veterans Affairs
• Utilized Veteran student employee to do outreach to admitted and matriculated Veteran students to impact recruitment/yield
• Utilized Veteran student employee to encourage matriculated Veteran students to register for Orientation
• Utilized Veteran student employee to do outreach to incomplete applicants
• Hired a 20-hour per week Admissions Counselor for Veteran recruitment/yield

4. Financial Aid Services (FAS) will create a proposal for a transition to off-campus housing grant
   a. Analyze the financial and demographic characteristics of the fall 2018 Campus Living Grant recipients to determine who would be most likely to need financial assistance for retention.
   b. Create a proposal for an established budget geared towards retaining students as they move off-campus their second year.

Measures:
   a. An analysis of the current Campus Living Grant recipients will be conducted by the end of the fall term.
   b. A proposal that includes anticipated funding needs and strategy will be presented by the end of February 2019.

Final Report:
Financial Aid Services conducted an analysis of the Current Campus Grant Recipients

Findings indicate that:
• 54% of the Pell-eligible students currently living in the Residence Hall received a Campus Living Grant
• The others in this pool found creative ways to finance on-campus housing

Informed Strategy for 2019-2020 Campus Living Grant:
• Presented new strategy to the Garrett Smith, Chancellor’s Office, and received approval on it for 2019-2020
• Reduced the highest amount of the Campus Living Grant from $8,600 to $6,000
  o Will support an increased number of new freshmen for Fall 2019
  o Will lessen the perception of lost aid as students progress from first to second year

In addition:
• FAS recognizes the state of the budget moving into FY20 and that funding non-revenue generating activities may not be a priority; FAS also recognizes that the retention of residential students is untested
• With budget constraints in mind, the One Stop and FAS collaborated with the Office of Off-Campus Engagement (Student Affairs) to provide educational activities and materials for students
• Multiple information sessions regarding off-campus housing were held in the residence hall
• The majority of students in attendance had already secured off-campus housing or were in negotiations with local apartment complexes

Moreover:

• If the University determines that a budget exists to target a small population of students moving off-campus, then FAS recommends focusing on the current Campus Living Grant students who live out-of-state
• Currently, there are 33 students receiving a total of $222,600
• It is likely that, with attrition, FAS could award students half of their current Campus Living Grant as a “Transition to Off-Campus Housing Grant” and stay within a $100,000 budget
• FAS suggests doing so as a non-renewable, second-year only fund to prevent accumulating expenditures

6. Collaborate with Graduate Admissions, Registrar’s Office, and the Bursar’s Office on a seamless pathway and promotion of the 4+1 (BA/MA) accelerated programs with the aim of increasing enrollment
   a. Incorporate 4+1 information into enrollment marketing materials, including search pieces, website, information session presentations and event materials.
   b. Work with departments to help define practices and policies associated with the implementation of the 4+1 programs including financial aid and scholarship eligibility and contribute to discussions about coding and billing.

Measures:
   a. Successful roll-out of web and print enrollment marketing materials.
   b. Creation of policies and practices that can be shared across relevant units.
   c. Conduct trainings with front line offices including Undergraduate Admissions, Financial Aid, Merit Scholarships and the One Stop to familiarize staff with 4+1 programs.

Final Report:
• Marketing and Promotion of 4+1 accelerated programs
  o Marketing search pieces have been updated and reprinted to include information on the 4+1 option
  o PowerPoint (to include information on 4+1 option) used by Undergraduate Admissions for campus visits has been updated
• Practices and Policies – Consistent with the policies and recommendations put forth by a workgroup looking at the 4+1 programs, additional steps have been taken to ensure that the Division remains compliant and that students transition seamlessly into these programs as follows:
  o Financial Aid Services provided information to Graduate Admissions regarding financial aid policies and accelerated master degree programs (AMP)
  o Staff from Financial Aid Services, Merit Scholarship, and the One Stop attended the Advising Collaborative to serve as a resource for advisors with follow-up questions to the presentation made by the Director of Graduate Enrollment Management Information Systems on 4+1 programs
Financial Aid Services coordinated with the Registrar’s Office to develop systematic coding and tracking of 4+1 students with financial aid applications to ensure compliance with grade level progression regulations.

Financial Aid Services now has a working query and procedure in place to review students on a regular basis to ensure that undergraduate aid is not awarded to a student who is not taking coursework towards undergraduate degree completion.

Chancellor Goal 2. Student Success

Enrollment Management Division Goals:

1. Implement Campus Logic in Financial Aid and The One Stop
   a. Collaborate with BDL campus and UITS to implement Campus Logic.
   b. Cross train staff in Financial Aid and The One Stop in Campus Logic.
   c. Develop automated email and text message communications to students that will be used in Campus Logic.
   d. Message students and families about this new way to submit financial aid documentation.

Measures:
   a. Financial Aid will perform a complete review of all financial aid requirements and eliminate unnecessary requirements by October 15, 2018.
   b. Campus Logic is implemented by December 30, 2018.
   c. Automated communication flows are established to remind students about outstanding requirements via email and text message by February 2019.
   d. On-time completion of financial aid requirements will improve by 5-8%.

Final Report:
UMB, UMD, UML, and UITS staff created a working group dedicated to an efficient and effective implementation of Campus Logic Student Forms software:

- The project launched in early October
- Campus Logic went ‘live’ on December 10, 2018
- Single Sign-On is now fully operational and has been integrated into the new applicant portal for incoming students and WISER for returning students
- Students have been informed of the new functionality via email and social media channels
- The new functionality has been shared with the Advising Collaborative and other key points of student contact to ensure that the change in processes is uniformly understood
- The following outlines some of the key markers, year-to-date, that demonstrate the efficacy of the product:

<table>
<thead>
<tr>
<th>Days/Files</th>
<th>2018-2019</th>
<th>2019-2020</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td># of days to process</td>
<td>4-5</td>
<td>1-2</td>
<td></td>
</tr>
<tr>
<td># of files selected for verification</td>
<td>2888 (25% of applications)</td>
<td>3735 (32.2% of applications)</td>
<td>29.3%</td>
</tr>
<tr>
<td>Total awarded to date</td>
<td>6077</td>
<td>7706</td>
<td>26.8%</td>
</tr>
</tbody>
</table>

In addition, Financial Aid Services completed a review of financial aid policies regarding student requirements and unnecessary steps were removed to further simplify the financial aid application process as follows:
• Elimination of required W2 statements
• Reduction in the number of third party letters for dependency appeal
• Reduction in the number of categories automatically triggered for producing additional documentation

Other steps taken by Financial Aid Services (FAS) to ensure student success are as follows:

• FAS and the One Stop staff attended a series of training webinars
• Senior leadership in FAS conducted working group sessions to further help staff understand the new system
• All student communications regarding financial aid application materials have been revised
  o Customized notifications will be sent to students via email and text message
  o Communication plans have been developed for parents who have not followed through on requirements
• Returning students will be notified in January 2020 about the enhanced method of completing financial aid requirements
  o Conveys that Campus Logic allows UMB to meet data security standards
  o Offers students an improved customer experience
• Reports have been put in place that allow FAS to measure improvements between 2018-2019, 2019-2020, and so on

2. Improve Student Understanding of Federal Satisfactory Academic Progress (SAP)
   a. Financial Aid will create a comprehensive SAP policy for undergraduate and graduate students that clearly defines the responsibilities of students, the impact of failing to meet standards, and the circumstances under which a student may appeal.
   b. Financial Aid will review and revise all SAP related communications and resources.
   c. Financial Aid will partner with advisors to update the SAP Workshop presentations for students who have not maintained SAP. This will include the development of an online SAP workshop made available to all students.

Measures:
   a. Financial Aid shares a comprehensive SAP policy for graduate and undergraduate students with the campus community.
   b. Financial Aid redesigns the SAP section of the website, all SAP related forms, and establishes a communication plan to reach students at regular intervals (i.e., 0, 30, 60, 90 credits).
   c. Completion of new SAP workshops and the availability of an online SAP workshop.

Final Report:
In an effort to improve student understanding of Federal Satisfactory Academic Progress (SAP), Financial Aid Services has:

• Collaborated with the One Stop, Veterans Affairs, University Advising, and college advisors to develop a comprehensive understanding of the UMB student experience with SAP
• Completed an in-depth review of federal regulations regarding SAP
• Participated in conferences and webinars to learn about best practices
• Reviewed the SAP policies and websites of peer institutions to inform best practices
• Conducted a thorough review of all SAP communications and revised them based on feedback from other offices, students, and parents
• Completed the new SAP policy as of December 3, 2018

Now that the new SAP policy is in effect, FAS has:

• Worked with Enrollment Management Marketing to redesign the website
• Coordinated with the Advising Collaborative to inform the community about the updated policy
• Established an ongoing communication plan to remind students about their responsibilities to maintain SAP
  o Broadcast emails were sent to all students prior to the end of the add/drop period to inform them of their responsibilities to maintain academic progress
  o The same information was shared with faculty via the beginning of the semester announcements from the Provost’s Office
  o This communication practice will continue at the start of each semester
• Noticed that improved communication and a more clearly defined policy have led to an increased understanding of policies and procedures among campus partners and students

Prior to the development of a comprehensive communications plan, FAS:

• Sent an email in the fall to all students with a current financial aid application, which explained SAP
• Conducted presentations for Success Boston advisors to help inform students in the application pipeline
• Conveyed SAP information to parents via the December edition of the parent newsletter from the Dean of Students Office
• Revised the marketing materials for fall 2019 applications to include more information about SAP and the importance of academic decisions in maintaining financial aid eligibility

In addition, FAS:

• Defined a timeline for evaluating specific SAP statistics in order to monitor potential changes as a result of improved communication and a more transparent policy
• Improved the Achieving Satisfactory Academic Progress (ASAP) workshop (which is a collaboration between FAS and University Advising) to articulate information to students more clearly
• Committed to having a staff member co-present at every ASAP workshop, which will now be provided online as well as in-person

3. Revise the merit scholarship policy to allow students whose GPA fell below the required minimum to regain scholarships when GPA increases to meet minimum
   a. At the conclusion of the fall 2018 semester, students who drop below the minimum GPA required to maintain their scholarships will be contacted and referred to the appropriate student support service/advisor.
   b. At the conclusion of the spring 2019 semester, students who dropped below the minimum GPA required to maintain their scholarships will be contacted for an appointment. The meeting will focus on coming up with a plan to regain their scholarships if their cumulative GPA reaches the requirement and to discuss options for financing their education.

Measures:
   a. An analysis of the retention of scholarships students in 2018-2019 compared to previous years can be done at the end of the cycle to measure the impact of this strategy.
Final Report:
The Office of Merit Scholarships reviewed and revised the policy, which was implemented once fall 2018 grades were finalized.

Going forward:
- All students who have lost their scholarships in previous semesters will be reviewed for an improved cumulative GPA
- When GPA reaches acceptable minimum, scholarships to qualified students will be reinstated for the following semester
- A budget analysis will be done to determine impact of new policy

4. Develop a profile with risk factors of the freshmen class of 2019 to be distributed at the end of spring 2019 so that targeted communications and interventions can begin prior to fall classes
   a. Work with campus community to identify risk factors.
   b. Coordinate communications and outreach to incoming students the summer prior to enrolling to introduce them to the resources and support services best aligned with their needs.
   c. Share data of incoming class with student support departments and advisors in preparation for the fall. This will make their outreach efforts more meaningful and targeted.

Measures:
   b. Profile of fall 2019 students produced by May 15th.
   c. Communications and interventions take place during the summer of 2019.

Final Report:
Five risk factors in operations over which the Division of Enrollment Management has some degree of influence were identified. Each risk factor is described in the table below:

<table>
<thead>
<tr>
<th>#</th>
<th>Risk Factor</th>
<th>Description</th>
<th>Action/Strategy</th>
<th>Target Group</th>
<th>How/Venue</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Family Finances/Financial Obligations</td>
<td>Explain financial aid, billing, health insurance, and payment plans</td>
<td>Develop communication strategy for students and families</td>
<td>Incoming students/families</td>
<td>Once bills are issued; send emails/texts with helpful links</td>
</tr>
<tr>
<td>2</td>
<td>Student Engagement/Bonding</td>
<td>Introduce opportunities for engagement with fellow students and involvement with the campus community</td>
<td>Use Social Media to create a student bonding campaign</td>
<td>Incoming students</td>
<td>Utilize student contact information; capitalize on social media</td>
</tr>
<tr>
<td>3</td>
<td>Learning Differences</td>
<td>Help students who received IEP based support in high school get information about receiving</td>
<td>Provide new students with a checklist of what needs to be submitted to the Ross Center</td>
<td>Students who have indicated on their application that they have an IEP</td>
<td>Letter to students; work with the Ross Center on summer initiatives</td>
</tr>
</tbody>
</table>
support services in college

4 Lack of Academic Challenge
High performing incoming students who opt out of the Honors College invitation (possibly from a lack of academic confidence) and then feel unchallenged
Encourage those new freshmen who opted not to participate in the Honors College and then earned a GPA of 3.6 or higher to apply
High achieving first year students who chose not to participate in the Honors College
Student speaker from the HC at the Scholarship dinner; partner with the HC to invite students who opted out to an Honors College event in the spring

5 Time-to-Graduation
First year students with dual enrollment credits often do not have credits posted in time for orientation/advising
Encourage students to submit their college transcripts prior to orientation
Students who have taken a dual enrollment course
Outreach from Transfer credit team as part of orientation sweep

5. Create modest scholarships/awards to be distributed to students with financial holds at the end of fall 2018 semester and again at the end of spring 2019 semester to encourage continuation.
   a. Identify funding from either Financial Aid, Merit Scholarships or an additional source.
   b. The Merit Scholarship Office will work with Financial Aid and the Bursar’s Office to identify academically strong students who have an account balance.
   c. A process will be created to review their account and make awards if the student is intent on returning.
   d. Once awards are made, outreach will be done to encourage enrollment.

Measures:
   a. Based on funding and awards made, we will be able to report on how many students received the additional aid and were able to continue their education.

Final Report:
In order to achieve this goal, the Office of Merit Scholarships:

- Conducted an email and text campaign to solicit applications from students with PD1 holds on their account which prevented them from registering for the spring semester
  o These students were offered a one-time grant of up to $400 to assist with their unpaid balance
  o Application deadline was Friday, December 14, 2018
  o 154 applications were received
  o After the deadline closed, representatives from the Financial Aid, Merit Scholarship, Bursar, and One Stop offices met to review applications and assign grant awards
  o 62 awards of up to $400 were made
  o Students who received awards were 11% more likely to register for the following semester than students who did not
6. **Support student continuation from fall to spring semester by aligning the comprehensive scholarship deadline and award with the spring registration schedule.**
   a. Universal Merit Scholarship application deadline will be moved from the end of November to Friday, November 2 and awards will be made by December 10.
   b. Earlier awards will allow academically strong students to use comprehensive scholarship funds to clear fall balances or spring bills and encourage continuation.

**Measures:**
   a. At the time of awarding comprehensive scholarships, we will be able to report out on the number of students who have a fall balance and track their enrollment continuation.

**Final Report:**
The Office of Merit Scholarships has completed this goal as follows:

- Approximately $400,000 in comprehensive scholarships were awarded to 274 high achieving, continuing students
- Award amounts ranged from $500 to $5,000
- Of the 274 award recipients, 25 had past due balances on their student accounts for the fall semester
- The scholarship awards cleared 15 of the past due balances, thus allowing those students to register for the spring 2019 semester
- The scholarship awards greatly reduced the account balances owed by the other 10 students
- The composition of the 274 comprehensive scholarship recipients is as follows:
  - Male: 32%
  - Female: 68%
  - White: 47%
  - Asian: 20%
  - Black: 10%
  - 2 or more ethnicities: 8%
  - Not specified: 7%
  - Awarded in Dec. but did not enroll spring ’19 semester: 2 or .73% (withdrew)

7. **Contribute to retention and persistence by focusing efforts and strategies on clearing outstanding account holds.**
   a. The One Stop will do direct outreach to students who are being billed for health insurance and had a waiver the prior year.
   b. The One Stop will do a campaign to help students who have past due balance complete the steps to secure a loan.
   c. The One Stop will do outreach to students who have an account balance during the pre-registration months (November for spring semester and March for fall semester). Individual text messages will make students aware of their financial obligation and based on their class schedule recommend a time for them to stop by the One Stop for assistance.

**Measures:**
   a. Using Salesforce, our case management system, we will be able to track how many text messages are sent and how many students visit the One Stop based on our outreach. Additional reporting will allow us to see how many of these students re-enroll.

**Final Report:**
The One Stop put in place action steps that will help students with health insurance matters and past due balances that prevent them from securing loans as follows:
Health Insurance was waived the prior year but has not been waived in the subsequent year which contributed to a past due balance (PD1) hold

- **Plan:**
  - Identify students with PD1 holds and review to determine if the student is being charged health insurance during the fall semester but appeared to have waived the charge the previous year
  - Reach out to students via phone and/or email to determine if they are currently covered under a comparable health insurance plan – if so, instruct students to submit a copy of their health insurance card and photo ID
  - Submit a copy of the health insurance card and photo ID to the Bursar’s Office to waive the health insurance charge
  - If the waived charge clears the student’s bill, One Stop will request the PD1 hold be lifted so the student can register for classes

**Incomplete Direct Loan Counseling and/or Student Loan Promissory Note (including Parent Plus Master Promissory Note)**

- **The One Stop put in place a plan to identify incoming fall semester students who had not completed the online forms that are required before loan funds can be disbursed to their student accounts and are thus left with a past due balance and a PD1 hold as follows:**
  - Requested a report from Financial Aid Services of all students awarded Direct Federal Student Loans who had not completed their MPN and/or Loan Entrance Counseling
  - Requested a report of students whose parents were approved for a Federal Parent Plus Loan and had not completed the Parent Plus Master Promissory Note
  - Reviewed over 600 student financial aid records and identified 546 students who needed loans to clear their balance
  - Contacted each student on the list: reached more than 250 directly and left messages for 231
  - Outreach resulted in over 181 students completing the required loan step, 38 parents completing the required Parent Plus Master Promissory Note, and 154 students cancelling their loan

**Financial Aid Recipients with a PD1 hold during pre-registration/registration months**

- **Plan:**
  - Identify financial aid recipients with PD1 holds to determine if they can be offered additional financial aid funds
  - Reach out to students via text messaging to invite them to call or visit the One Stop to discuss their financing options
  - Direct Bursar’s Office to lift all resolved PD1 holds if it can be verified that funding is guaranteed
8. **Work with Academic Affairs to create a more seamless processing of new transfer students**
   a. Work with Undergraduate Studies and Registrar to create a more seamless transfer process for new incoming students with non-equivalent transfer credit.
   b. In conjunction with Registrar’s Office, make enhancements to the EEW form (Equivalent, Exception, Waiver Form) to assist faculty in creating new equivalency rules.
   c. Reduce the number of current exceptions by providing an opportunity for faculty to deem non-equivalent transfer courses as sufficient to fulfill major requirements.

**Measures:**
   a. More consistent application of transfer credit for all students.
   b. Reduction in the number of exceptions and an increase in the number of non-equivalent courses fulfilling a requirement.
   c. New equivalency, exception, and waiver form created by November 1st.
   d. New business practice is agreed upon and shared.
   e. Training is conducted with faculty and staff

**Final Report:**
In an effort to streamline the process for Transfer students, the Office of Undergraduate Admissions implemented the following new practice:

- Updated the Equivalency, Exception and Waiver forms so that the need for generic pseudo electives can be identified and applied directly to requirements, thus ensuring consistency in application of credit for Transfer students who are transferring like courses

9. **(Year 1) Perform a review of the One Stop to determine the method and type of services students expect to receive and how the space should be redesigned to meet those needs**
   a. Determine what additional services should be provided in the One Stop.
   b. Determine the way in which students prefer to interact with the One Stop and the method by which they expect to receive services.
   c. Develop a plan for redesigning the physical space to meet the needs of students today.
   d. Work with A&F and Advancement on funding or naming opportunities to support the cost of the redesign of the physical space creating a new One Stop.
   e. Identify an office name that would reflect the changes made.

**Measures:**
   a. Comprehensive review of 3-4 One Stop centers at other universities that are known for excellence.
   b. Analysis of current student traffic in our One Stop based on CRM data and an analysis of survey results.
   c. Request and review of proposals from architects outlining physical space transformation and the cost associated with completing the redesign.
   d. Identify possible funding sources.
   e. Propose a new office name.

**Final Report:**
A One-Stop Review Team including representation from Financial Aid, Bursar’s Office, Registrar’s Office, and Enrollment Management was formed in October. The Review Team met and agreed that a redesign of the physical space needed to be informed by type and method of services delivered. The following steps were taken to collect the necessary information to re-imagine the One Stop:
A rubric was created to help compare the current One Stop office, staff, and services to those of other One Stop offices. The following questions guided data collection:

- When did your One Stop office open
- Which offices/departments do you represent (may need to seek clarification on which offices are included, i.e., is student employment part of Financial Aid)
- What population do you serve (graduate, undergraduate, prospect, staff, etc.)
- Size of the campus community served
- Can you highlight the type of services provided; any data you can share; the depth of service provided for each home office (specifically loan adjustments, withdrawals, etc.)
- Method of services provided (face to face, email, chat, online, phone, other)
- Do you have a cashier (payment) window
- Number of staff members employed in the One Stop and an overview of their positions
- In addition to providing frontline support, what other work are One Stop members engaged in to help support student success
- Can you briefly describe the physical space (may want to ask for photographs)
- What technology is used in the One Stop to manage traffic; what type of phone system is being used, and does it connect to your student information system or CRM
- Hours of operation; do they change during peak times or during the summer
- How does the One Stop staff interact with the home offices it supports; is that process aided with the use of technology
- Do home office staff ever physically work in the One Stop office
- Are students allowed/able to physically get to home offices and bypass the One Stop; do home offices take incoming calls
- Since the office has been opened, has it undergone, or is there any plan for it to undergo, a redesign or expansion of services

The Review Team selected One Stop offices at 3 campuses for comparison: University of San Diego, University of Cincinnati, and University of Knoxville

- All three were recognized in a review performed by Eduventures for pushing the student services envelope

One hour interviews were conducted with the Director of each One Stop

The information was compiled and resulted in the creation of a document which outlines the 9 items the Review Team feels should be considered in the redesign of the One Stop

The findings were presented to the Vice Chancellor of Enrollment Management on December 10, 2018, as follows:

**One Stop Review Findings:**

1. **The services in the One Stop should be expanded to include providing phone and email support for the home offices**
   - Taking on these additional tasks will allow the phone and email services to mirror the experience of walk-in traffic and present a united front
   - Emails sent to students will be under one domain name
   - Batch emails can continue to be sent from home office staff but will be under the One Stop email address

2. **The Management Structure in the One Stop needs to be adjusted to create hierarchy in roles**
   - The director position needs to be responsible for
     - Timely and widespread reporting of services performed
     - Coordinating staff training
iii. Serving on committees and being engaged in work that focuses on student success activities occurring both inside and outside of the One Stop
iv. Identify policies and procedures that create bottlenecks and advocate for solutions that support student success
b. Associate Director position needs to take on more responsibility for managing day to day operations within the One Stop
   i. Manage phone, email and walk-in queues
   ii. Synthesize, report and present solutions for challenges our students report

3. **Staff liaison assignments need to be created to connect the One Stop with the home offices**
   a. Liaison will be responsible for attending home office staff meetings
   b. Liaison will keep the One Stop staff informed of changes in policies and procedures and also feed up to the Director/Associate Director in the One Stop and the home offices patterns they are encountering in their day to day interaction with students.

4. **Walk-in traffic should no longer be allowed at the home offices**
   a. Need to present the One Stop as the only location a student needs to visit to receive direct service
      i. Counseling role of the One Stop staff will need to be expanded
      ii. If home office support is needed to address student walk-in services, need a system in place in which the staff are either relocated to the home office on a permanent basis or a schedule is created that assigns home office staff to the One Stop

5. **Must work diligently to expand the type of services students can complete online**
   a. The focus should not be on increasing walk-in traffic but instead providing online services for the most common tasks students perform

6. **Investments in a phone system and other technology need to be made to improve the delivery and expansion of services**
   a. Phone system must allow for
      i. Auto messages that can be updated by the staff and can help answer questions students may have
      ii. Queuing calls, ring back, notification of wait times, etc.
      iii. Reporting capability
   b. Redesigned website that promotes the One Stop as the central hub and provides additional services and information

7. **Financial literacy and student support and registration activities need to be integrated into the work of the One Stop staff**
   a. Financial literacy may continue to be managed by Financial Aid Services but the staff in the One Stop should be contributing to this work and it should not be perceived as voluntary
   b. Student support initiatives need to be integrated into the work the One Stop staff do and needs to be coordinated by the Director of the One Stop
      i. Calendar of activities should guide this work
      ii. Report training needs to occur so that the Director of the One Stop and/or staff can be more self-sufficient in executing student success initiatives
8. **Redesign the physical space to better address the transactional needs students have but to also provide more in-depth counseling space and phone/email space**
   a. Greeting area needs to be created that can be staffed by students and help guide visitors
   b. Walk-in space can accommodate transactional needs which may include transcript requests, enrollment verification requests, class registration activities, etc.
   c. Counseling space needs to be created to provide privacy and allow staff to assist students with understanding a bill, loan counseling, etc.
   d. Phone and email space needs to be defined away from counseling and walk-in area
      i. All work stations need to be equipped with upgraded computers to meet the needs of students at peak processing

9. **Centralizing additional operations within the One Stop should be considered. Other One Stop offices provide both Student Employment and Merit Scholarship support**
   a. This can be addressed by further cross training One Stop staff or by physically relocating Student Employment or Merit Scholarships

- **Next steps:**
  o A one page prospectus was created to be used to help raise funding for the redesign project
  o Working with a vendor to understand how the physical space can be redesigned to meet future needs
  o Beginning to look at the aspects of the redesign plan that can be put into place while funding is being secured, for example:
    - Additional cross training of One Stop staff
    - Review of job descriptions for all One Stop staff
    - Understand which staff resources may need to be reassigned to the One Stop if their operation takes over all incoming phone and email traffic

(YEAR 2) **Implement new services in the One Stop and begin the physical space redesign**
   a. Train One Stop staff to perform new services.
   b. Work with departments and offices on campus as part of introducing new services into the One Stop
   c. Develop a timeline for space renovations and implementation of new services.

**Measures:**
   a. New services offered and tracked in the CRM.

10. **Gather and analyze data to draft a proposal on how to help retain academically successful first-year students who are high risk for transferring out of UMass Boston. Using the findings, make recommendations on meaningful scholarship awards to retain these students for their sophomore year.**
    a. Review Fall 17 data on first year freshman with a 3.5 or higher cumulative GPA who did not return to the University for Fall 18. Use this data to determine common risk factors that would indicate a student has a high chance of transferring by their sophomore year.
    b. Once a set of common characteristics and risk factors has been identified, draft a proposal on potential awards to be made automatically to this group of students in an effort to keep them. This will include a proposed budget with expected costs for approval.
c. Once the Advising Center begins using the case-management advising system, track when a freshman requests a transcript for transferring and act quickly to make award offers to these students. This is unlikely to be completed this academic year, but can be a good tool once the Advising Center utilizes the technology.

Measures:
   a. By the middle fall semester, obtain the data and begin to analyze it for a proposal to be submitted to the Chancellor’s Office.
   b. By the end of the fall semester, submit a proposal to Chancellor’s Office along with a cost/benefit analysis so a decision can be reached on how to implement this program.

Final Report:
The Office of Merit Scholarships conducted extensive research on first-year freshmen who had a 3.5 cumulative GPA or higher and who did not return to the University the following year, and could not find a common risk factor among this group.

After researching the scholarship options that might assist with retention, the Office of Merit Scholarships:

- Conducted extensive outreach to freshmen during the spring semester encouraging them to apply for scholarship awards that will go toward their sophomore year
  - This will ensure that successful first-year students are given a financial incentive to return to the University for their second year
- Conducted extensive outreach to freshmen with high cumulative GPAs to increase interest in scholarship opportunities via:
  - Email and text message campaigns
  - Outreach to the Advising Collaborative
  - Tabling in the residence hall and outreach to residence hall staff

As a result, the Office of Merit Scholarships was able to award 147 freshmen scholarships ranging from $500 to $1,000 towards their sophomore year as an incentive to continue their studies at UMass Boston. This effort is expected to have a positive impact on retention rate.

Chancellor Goal 3. Online

Enrollment Management Division Goals:

1. Financial Aid will collaborate with advisors to develop an online version of the Satisfactory Academic Progress (SAP) Workshop.
   a. Financial Aid will work with advisors to update the curriculum for the SAP workshop, which will incorporate information regarding the specific financial aid SAP regulations and instructions.
   b. Financial Aid and advising will include the availability of an online SAP workshop in all communications regarding SAP appeals.
   c. Financial Aid and advising will use Zoom to facilitate online versions of the SAP workshop.
   d. Financial Aid will develop metrics on incomplete SAP appeals and appeals that reflect a lack of understanding of the appeal requirements.

Measures:
   a. Re-designed curriculum for SAP workshops that are adaptable to an online platform with a pilot workshop hosted in the fall 2018 semester.
b. Advising and Financial Aid will hold three SAP workshops online during the spring 2019 and summer 2019 terms.

c. Financial Aid will build upon established SAP appeal metrics to determine efficacy of improved SAP curriculum and availability of online workshop.

**Final Report:**

As part of the online effort, Financial Aid Services:

- Made the ASAP workshop available online as well as in-person
  - The first online ASAP workshop was held on December 10, 2018
  - Four students attended and provided positive feedback regarding the information presented and the availability of the workshop online
- Worked with Enrollment Management IT to coordinate a Zoom license for FAS to facilitate the online platform
- Defined a timeline for evaluating specific SAP statistics in order to monitor potential changes as a result of improved communication, a more transparent policy, and the availability of an online workshop

In addition, FAS:

- Collaborated with University Advising to develop a schedule for spring workshops that will incorporate the availability of online workshops
- Completed six online ASAP workshops in collaboration with University Advising
- Scheduled five additional workshops for the month of June
- Cross-trained FAS and University advising staff to ensure that there is depth in the number of individuals prepared to co-present the workshops

It is interesting to note that students have been receptive to the new platform and have actively engaged in the sessions.

2. **Develop data on undergraduate majors that are in demand by prospective students looking for an online option.**

   a. Using enrollment data, identify the majors that are sought after by prospective students
   b. Once sought after majors are identified, identify other regional colleges and universities that offer those majors online
   c. Examine the cost of the popular online majors at the colleges and universities that offer those majors
   d. Survey local community colleges to see if they offer feeder associates degrees to the sought after majors

**Measures:**

   a. Data will be shared with Deputy Chancellor

**Final Report:**

Enrollment Management produced a comprehensive, data-based report derived from scholarly sources, which covers the multiple facets of this goal listed below for implementation:

- Enrollment history of students nationwide with breakdowns by enrollment in: (a) one online course, (b) some online courses, and (c) exclusively in online courses, and showing the growing proportions of all students who are enrolled in at least one online course
• List of top enrolling institutions nationwide for online enrollment (with a two-year enrollment comparison), identifying for-profits and community colleges among non-profit four-year institutions
• Nationwide enrollment in online courses by major field of undergraduate study, with breakdowns of enrollment: (a) one or more online class, (b) exclusively online classes, and (c) entire degree program online
• Fast facts on online education specifically in Massachusetts
• Map of community colleges and state universities in the Massachusetts online program consortium
• Top regional and Massachusetts online Bachelor degree programs by institution and undergraduate degree of study
• Additional accredited online universities in Massachusetts for Bachelor’s degrees
• U.S. Department of Education statistics of the number of students taking: (a) any online classes, (b) exclusively online classes, and (c) entire programs online within the context of all undergraduate students and with breakdowns of student characteristics

Comprehensive report was shared with the Deputy Chancellor.

Chancellor Goal 4. Residential Living

Enrollment Management Division Goals:

1. Financial Aid will develop budget and financial planning programs geared toward the transitioning of residential students to off-campus housing
   a. The Division of Enrollment Management will collaborate with the Bursar and Campus Services staff to develop a policy for prorating meal plans charges and campus living grants if a student does not live on campus for the entire length of their licensing agreement.
   b. Financial Aid will contribute to discussions aimed at improving the communication and reporting needs necessary to explain the financial obligations of living off campus and the interaction of financial aid.
   c. Financial Aid and the One Stop will do outreach to resident students to invite them to meet and receive one-on-one budget planning worksheets for them and their families that reflect financial aid and cost of attendance expectations.

Measures:
   a. Send the policy related to prorating meal plans and Campus Living Grants prior to September 2, 2018.
   b. Develop a comprehensive training manual for student service offices on housing and financial aid related information.
   c. Utilize budget worksheets at campus recruitment events that integrate the separate University and housing costs in a manner that allows families to understand their full financial obligation.

Final Report:
In order to achieve the completion of this goal, Financial Aid Services:

• Coordinated with the Bursar’s Office and Campus Services to develop a proration policy for Campus Living Grants and the meal plan
  o The information was sent to all residential students prior to September 2, 2018
The same information was sent to guarantors from the COCM lease in mid-September

- The policy is available on the Bursar and FAS sections of the website
- Re-designed a vacant Associate Director job description to include financial literacy and educational programming to all students
  - The position has been filled and the Associate Director and her reporting staff have participated in training workshops on providing financial education to students
  - The Associate Director and her team have reviewed materials from other schools to learn about established best practices in conveying financial aid and off-campus housing information to students
- Coordinated with Student Affairs to present workshops in the residence hall designed to educate students about financing their transition to off-campus housing
- Adapted the same presentation for the True Beacon (first-year student athlete) program
- Reviewed the budget worksheet that is used to convey the interaction of cost and aid to students at recruitment events in order to make any necessary improvements
- Invited students to come to the One Stop for individual budget and estimated financial aid eligibility reviews

In addition:

- Returning students will receive a text message after returning student awards are prepared (mid-June) inviting them to reach out to their financial aid counselor if they have questions about financing their off-campus living arrangements
- FAS has tailored some of the outreach activities for the next incoming class to help convey the cost information and billing processes more clearly as follows:
  - Revamped the Financial Aid Planning Worksheets to portray more accurately the separation of the billing process and the overall use of financial aid funds to assist with living on campus
  - FAS, the Bursar’s Office, and COCM have collaborated to create a video that explains the billing process between the University and COCM, including how financial aid is considered as part of paying for the two separate charges
  - FAS has prepared a template for detailing student charges, financial aid, and housing costs individually, which will be sent to students who have signed licensing arrangements for fall 2019 once the University’s charges are available and room assignments have been made

2. **Conduct a complete review of administrative processes (housing reservation fees, communications, financing, Campus Living Grants, etc.) utilized for fall 2018 resident students so improvements can be made**
   a. Identify all business practices to be reviewed and identify the individuals/areas that should participate in the review.
   b. Form review groups.
   c. Review groups will make recommendations for improved business practices

**Measures:**
   a. Business practices for review will be identified by September 15th.
   b. Review groups are selected by October 1st.
   c. Recommendations from review groups due on November 1st.
   d. New business practices put in place by December 1st.
Final Report:
This goal falls under the purview of the Associate Vice Chancellor in Student Affairs. Staff from Enrollment Management served on the committees formed by the Associate Vice Chancellor to review residential life administrative processes as follows:

- Process Review
  - Corey Ford
  - Michael Todorsky
- Problems and Solutions
  - John Drew
  - Katie Lynch
  - Nina Williams
- Messaging Strategy
  - Betsy Butterworth
  - Corey Ford
  - Lisa Johnson

The Associate Vice Chancellor’s final report has informed some of the practices of the division of Enrollment Management as follows:

- An analysis of current Campus Living Grant recipients has been completed and reviewed by leadership in the division of Enrollment Management and by the Deputy Chancellor
- The analysis has influenced the division’s 2019-2020 strategy for the Campus Living Grant
  - Awards are more reflective of a family’s ability to pay
  - A strategy has been developed that will allow awards to be offered to a greater number of students

Other contributions made by the division of Enrollment Management include:

- Media blitz to inform the public about our residence hall
- Materials, presentations, tours distributed/given by Undergraduate Admissions include residence hall information

Chancellor Goal 5. Fundraising

Enrollment Management Division Goal:

1. Collaborate with Alumni Relations and University Advancement on receptions and programs to jointly host prospective students and their parents with alumni.
   a. Develop a calendar of events.
   b. Collaborate on invitations and programs.

Measures:
   a. Number of joint events planned.
   b. Number of prospective students and families in attendance.

Final Report:
This goal is a continuation of an ongoing collaboration between Enrollment Management, Advancement, and Alumni Relations to reach out to prospective students, their parents, and alumni at two major annual events as follows:

- Falmouth, Massachusetts (August)
o Prospective accepted students from the Cape are invited to join UMass Boston alumni and leadership for dinner at an oceanside restaurant
o Annual event to bring alumni who live in the Cape Cod region first hand updates on University news
o Vice Chancellor of Enrollment Management has been part of the speaker program
o Provides an opportunity for accepted students and their families to meet UMass Boston leadership and alumni while learning more about the University

• Naples, Florida (March)
  o Accepted students from the area and their parents are invited to join UMass Alumni at the annual Naples St. Patrick’s Day parade
  o Accepted students have the opportunity to meet UMass Boston leadership to learn more about the University
  o Enrollment Management gives University information to the many High School students who participate in the parade
  o Enrollment Management visits Florida High Schools while in the greater Naples, FL, area
    ▪ This year, the Vice Chancellor visited five high schools in Naples and Fort Myers to meet with Guidance Counselors and students to talk about the many benefits of attending UMass Boston
    ▪ The Vice Chancellor also hosted a successful UMass Boston event for Guidance Counselors from the greater Naples and Fort Myers areas