

Enrolment Management Support Technology

WARUCC 2017
Calgary, Alberta

Overview

- Historical perspective and recent context
- Three projects
 - Self-Recorded grades
 - Offer Acceptance
 - Automated Evaluations
- General Outcomes
- Lesson Learned

UNIVERSITY OF ALBERTA IS ONE OF THE TOP 5 UNIVERSITIES IN CANADA



UNIVERSITY OF TORONTO, MCGILL, UBC, UNIVERSITY OF MONTREAL



UNIVERSITY OF ALBERTA
OFFICE OF THE REGISTRAR

38,309

STUDENTS

700

PROGRAMS

18

FACULTIES

5

CAMPUSES

TARGET:

3:1

UNDERGRADUATE / GRADUATE



2013 Admissions Environment

- Admitted applicants not required to formally accept offer
- 17% of direct entry offers made in the spring were later revoked
- Active enrolment management virtually non-existent
- Most admissions policies were provincial centric
- Deadlines were later, and sometimes applied inconsistently
- Faculties held authority relating to most enrolment activity
- Reliance solely on grade 12 final grades

Office of the Registrar - Ten Point Enrolment Management Plan

1. Establish Advisory Committee on Enrolment Management
2. Set and Adjust Admission Averages for all Direct Entry
3. Single Admission Offers
4. Change Evaluation Criteria/Process to support earlier decisions
5. Implement Offer Acceptance

Office of the Registrar - Ten Point Enrolment Management Plan

6. Application Workflow
7. Establish Fewer and Predictable Dates for Admission Offers
8. Increase Alignment of Scholarship and Residence Offers to Offer of Admission
9. Comprehensive Offer Packages
10. Discussion on Recruitment Strategy

Technology & Systems Overview

- Application for Admission
 - In-house software application
- PeopleSoft Campus Solutions
 - Evaluation Management System
 - Offer Acceptance Delivered Functionality
- Alfresco (Electronic Document & Records Management System)
 - Dashlet - Task Management
 - Scanned paper documents
 - Triggers new work to be completed on an applicant's file

Self-Recorded Grades

- High school students submit official documents via mail or fax
- Resulted in confusion
- Delays in admission offers
- Increased student service inquiries
- Timing of transcript information being released
 - Typically mid-term and/or final results

Self-Recorded Grades

- Three month project
 - Business Analyst, Functional Analyst, Project Manager, Developers
- Application for Admission development changes
 - Ability to accept courses and grades
 - Includes document upload for international high school students
- Applicant can return and provide updated courses and grades
- Integration with Campus Solutions

Self-Recorded Grades

- Alignment with other U15 institutions
- Firm admission offers earlier and faster in the cycle
 - Encourages applicants to move forward with other applications(e.g. Residence, awards and study permits)
- Efficiencies by reducing data entry as applicant provides the information electronically
- Simple straightforward process for students
- Additional data for analysis to influence policy changes

Offer Acceptance

- Accept/Decline/Cancel their admission offer
 - Tied to Tuition Deposit (\$500)
- Initial implementation (2014)
 - Use of negative service indicators
 - Add/Remove based on status
 - Extremely manual process
 - Delay in reconciliation due to timing of batch processes
 - Increase in student inquiries.
 - Complex business requirements
 - Some programs not required to pay deposit
 - Required technical developer to customize solution

Offer Acceptance

- Second iteration (July 2016)
 - Five month project
 - Business Analyst, Functional Analyst, Project Manager, Developer
 - Use of delivered tuition deposit functionality in Campus Solutions
 - Completely configurable by functional user
 - Allows for flexibility to accommodate more complex business rules
 - No delays in processing the next step for applicant (e.g. matriculation)
 - Run two solutions in parallel until Winter 2017

Offer Acceptance

- Earlier confirmation of student commitment (based on deposit)
- Earlier active enrolment management opportunities for faculties
- Earlier indication of cohort quality for each Faculty
- Earlier indication of class sizes, course and section scheduling

Automated Evaluation

- Leverage technology in Campus Solutions to automate evaluations
 - Evaluation Management System
 - Ability to define rules both simple and complex
 - Leverages existing admission requirements data
- Scope included currently attending high school students
 - 15,000 currently attending high school applicants
 - Two choices per application
 - 35,000 evaluation instances
 - 5,000 applicants evaluated end to end and offered admission
 - No human intervention

Auto Evaluation – What it took?

- Seven month project
 - Project Manager, Business Analyst, Functional Analyst, Developers
- Learn new technology and functionality
 - Both functional users and developers were unfamiliar
- Changes to process and workflow within the Admissions unit
 - Workflow being handled by Alfresco previously
- Went live October 2016

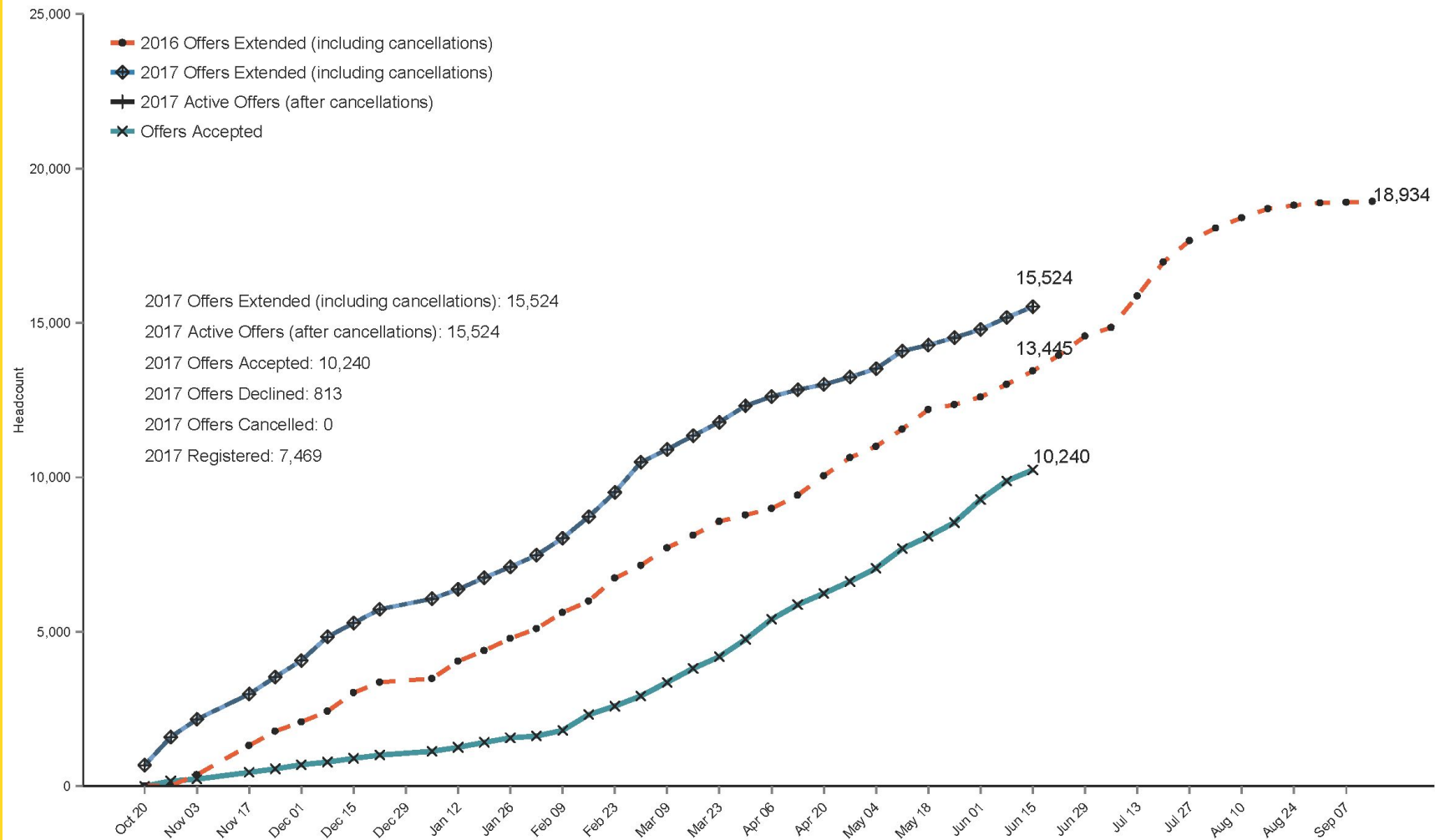
Auto Evaluation – Results/Benefits

- Significant decrease in offer turnaround time for domestic high school applicants
- RO & Faculties can focus on more complex work (e.g. transfer applicants)
- Standardize evaluation process. Reduce error. Reduce workload. Confidence in all HS applicants being treated the same
- Agility, flexibility and responsiveness throughout cycle
- Better volume management for applications (8% total)

WEEKLY POINT-IN-TIME REPORT

Office of the Registrar, Fall 2017 Enrolment Cycle
June 15, 2017

ADMITTED, ALL UNDERGRADUATES



*Data is from Acorn Tableau except offers accepted and offers declined, which are from ADMSTATS.

*Offers Cancelled refer to "offers cancelled due to applicant failure to accept offer and pay deposit".

*Offers Declined/Cancelled refer to applicants declining or having offers cancelled on all priorities. Those who declined or had offers cancelled on a specific program but accepted an offer on another priority are not included in these counts.

General Outcomes

- Impact to yield rates
- Highlighted the need for a more configurable solution
- Success through a small project team with diverse set of skills and knowledge
- Creating capacity to further centralize admission processes
- Ability to handle 8% increase in applications with reduced resources
- Enables more effective discussions on active enrolment management
- More comprehensive data set
- Strengthened RO credibility and relationship with Faculties

General Outcomes

- Masking the need for further improvement
- Reduce the complexity of business rules and practices
 - Address practices and policies before attempting to implement a solution
- Faculties not prepared for impact of workload timing
- Technical expertise learning during project implementation
- Multiple systems to support admissions processes, lack of integration and proper workflow
- What do you do when you're full?

Questions?

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