EMF Operational Efficiency Benchmarking Survey

Section 1: About your Position

Name:
Institution:
State:
Institution Type: Public/Private
Current Job Title:
How long have you been in your current position (disregarding purely titular changes)?
How long have you been at your current institution?

Section 2: Organizational Structure

Please answer questions as they relate to your organizational structure for the year 2015-2016.

1. To whom do you directly report?

2. Is your position part of the President's/Chancellor's Cabinet? (Y/N)

3. Is your position a formally combined Enrollment Management and Student Affairs leadership role? (Y/N)

4.

   a. Does your institution have a Student Success committee? (Y/N)

   b. Which of the following best describes your relationship to the student success mission of the institution? (Please check all that apply.)
      - Job description/Performance review explicitly assign primary leadership and formal accountability for student success
      - Lead or co-chair a committee or task force on student success
      - Sit on but do not lead a student success committee or task force
      - Influence student success through owned EM functions, but not tasked with it formally

   c. Do you anticipate your formal responsibilities for Student Success to increase in the next year?

5. Check your responsibilities (all that apply) with respect to the given student population?

	Marketing (advertising)	Recruitment	Admissions Processing (e.g., data entry)	Admissions Decisions	N/A
Traditional Undergraduate					
International					
Graduate					
Online					
Adult					
Transfer					
Veterans					
Athletes					
Professional Schools					

6. If applicable, for the following student groups, please indicate the total number of students (full- and part-time) that matriculated at any point during the last full academic year (2014-2015).

Student Type	Number of Students
International (full-time)	
International (part-time)	
Online (full-time)	
Online (part-time)	
Graduate (full-time)	
Graduate (part-time)	
All Undergraduate (full-time)	
All Undergraduate (part-time)	

7. For the functions listed, please indicate which description most accurately captures your relationship to the office.

	It reports to me (either directly or through another office that reports to me)	It reports through a different division but I am allocated staff members' time	I have limited to no control over it	Not applicable at my institution
Admissions				
Fin. Aid				
Registrar				
One-stop shop front-desk generalists (only if not included in the above count)				
Institutional Marketing / Communications				
Admissions Marketing /Communications (if separate from institutional)				
New Program Development / Market Research				
Academic Advising				
Academic Preparation Programs (e.g. TRIO)				
Success Coaching (generalist advising)				

New Student Orientation				
First-Year Experience				
Career Services				
Parent Outreach Programs				
Residence Life				
Veteran's Affairs				
International Student Office				
Adult Student Office				
Institutional Research				
Non-IR Analytics Team				
Other				

Section 3: Staffing

Please answer the following staffing questions for the current academic year (2015-2016)
(Please indicate total staff – both full- and part-time employees.)

1. Admissions Staff:
   a. Within the Office of Admissions (not including call centers), please indicate how many staff fall into the following categories (exclude temporary hires):

   - Traveling Recruitment Staff (travel substantial part of time/role in- and out-of-state and international travel included)
   - Regional Recruitment Staff (e.g., recruiter based away from campus)
   - Campus-Based (travel can occur, but it is not their main role, e.g. events staff, tours, etc.)
   - Processing/Clerical (office-based, majority non-recruitment/non-event staff)
   - Management
   - Other
   - Total staff
   - Please indicate the approximate number of student workers in your Admissions Office

2. Please answer the following questions as they relate to your admissions activities and staffing:
   - How many states does your admissions team visit?
   - How many countries does your admission team visit (excluding visits by international recruitment agents)?
   - How many temporary staff do you hire to read applications?
   - On average, for how many months do you employ these readers?
   - How many temporary staff do you hire as traveling recruiters?
   - On average, for how many months do you employ these "road-runners?"

3. Financial Aid Staff:

   - Student-Facing Counseling
   - Awarding/Packaging Staff
   - Processing/Clerical Compliance
   - Management
   - Other
   - Total Staff
   - Please indicate the approximate number of student workers in your Financial Aid Office:

4. Registrar's Office Staff (excluding temporary hires):

- Student-Facing
- Processing/Clerical
- Management
- Other
- Total Staff
- Please indicate the approximate number of student workers in your Registrar's Office:

5. Salary Range for following positions:

VP Enrollment Management	
Associate VP Enrollment Management	
Assistant VP Enrollment Management	

6. Salary range for the following positions in Admissions and Financial Aid:

	Admissions	Financial Aid
Director/Dean		
Associate Director		
Assistant Director		
Entry Level		

Section 4: Budgeting

Please answer the budget questions for the current budget year 2015-2016.
(Please round to the nearest thousand in U.S. dollars. Approximate where necessary.)

1. Total EM operational budget (Excluding institutional financial aid, salaries, and vendor spend)

2. What is your total salary budget for the following offices?
- Undergraduate Admissions
- Financial Aid
- Registrar
- Total Salary Budget for All Offices Reporting to EM

3. Operational budget for the following offices (exclude salaries, financial aid allocations, and vendor relationships). For each of the offices, please estimate what proportion of the budget was spent on staff development or training (e.g., conferences or courses)
- Undergraduate Admissions
   - o Percentage of Budget Spent on Staff Development Training
- Financial Aid
   - o Percentage of Budget Spent on Staff Development Training
- Registrar
   - o Percentage of Budget Spent on Staff Development Training

4.
   a. Excluding all dollars spent on vendor contracts, what is your budget for Admissions Marketing (e.g., print, online, television, radio advertising etc.)?
   b. Please break out your admissions market budget (listed above) by amount spent on the following:
      - o Print
      - o Online
      - o Other (radio, television)

5.
- a. Compared to 2014-2015, did your 2015-2016 operational budget:
  - o Increase
  - o Decrease
  - o Stay the same
- b. Compared to your 2015-2016, do you anticipate that your operational budget for 2016-2017 will:
  - o Increase
  - o Decrease
  - o Stay the same

Section 5: Vendor Relationships

Please answer questions as they relate to your vendor relationships for the current budget year (2015-2016).

1. Total Vendor Budget (approximate if necessary): _____

2.
- a. Compared to 2014-2015, did your 2015-2016 vendor budget:
  - o Increase
  - o Decrease
  - o Stay the same
- b. Compared to 2015-2016, do you anticipate that your vendor budget for 2015-2016 will:
  - o Increase
  - o Decrease
  - o Stay the same

3. Please indicate the outsourcing status and associated contract value of each of the following services:

	Outsourced	Partially Outsourced	In-House / Not Outsourced	Not Applicable to my institution	Estimated Vendor Contract Value (ranges)
Admissions CRM					
Financial Aid Optimization					
Search (excluding marketing and publications)					
Marketing/Branding (including publications, online ads, etc.)					
Name-Buying not through Search					
Scholarship Awarding Platform					
International Recruitment Agents					
Admissions Call Center					
Financial Aid Call Center					
Market Research Analysis					
Other _____					

4. For the following functions, please identify your vendor (check all that apply)
    a. Admissions CRM
        - Admission Plus Pro (Rediker, Admissions Pros)
        - Campus Management (Talisma)
        - CollegeNET (Intelligent Connections, Prospect CRM)
        - Education Systems, Inc. (EMAS Pro)
        - Ellucian (Banner Relationship Management, Recruiter, Datatel)
        - Enrollment Rx
        - Edge IP (ezRecruit)
        - Fire Engine RED (Fireworks)
        - Hobsons (EMT Connect, Intelliworks, Radius)
        - Jenzabar (Recruitment Manager, Candidate CRM)
        - Liaison (Spectrum, Enrollment Management Platform, EMP)
        - Oracle (On Demand, PeopleSoft, RightNow, Siebel)
        - Ruffalo Noel-Levitz (Enrollment Manager, Admissions Lab, Recruitment Plus)
        - Salesforce1 (for higher education)
        - TargetX (Recruitment CRM)
        - Technolutions (Slate)
        - N/A
    b. Search
        - ACT Educational Opportunity Service
        - Capture Higher Ed
        - Chegg Recruitment Services
        - College Board Student Search Service
        - CollegeFish.org
        - Fire Engine RED
        - Royall & Company
        - Ruffalo Noel-Levitz
        - Stamats
        - TWG Plus
        - Whiteboard Higher Education
        - N/A
    c. Financial Aid Leveraging
        - GDA Integrated Services
        - HighTower Higher Education Solutions
        - Hardwick Day/Royall
        - Human Capital Research Corporation
        - Maguire Associates
        - Regent Education
        - Ruffalo-Noel-Levitz/Scannel & Kurz
        - Scott Healy & Associates
        - SHBrooks
        - Third Coast Analytics
        - N/A

Section 6: Baseline Metrics

For the fall 2015 undergraduate population, please provide the following data:

1. Admissions

Admissions/Recruitment	Full-Time, First-Time in College	New Transfer	Returning Students
Number of Inquiries			
Number of Applications (Complete and Incomplete)			
Number of Completed Applications			
Number of Admitted Students			
Number of Out-of-state Enrolled			
Number of Enrolled Students			

2. Financial Aid

Total Institutional Grant Aid Awarded (including endowed aid)	
Approximately what percentage of institutional aid budget comes from endowed funds?	
Institutional grant aid awarded to incoming students (full-time undergraduate freshmen and transfers)	
Number of Pell Grant Recipients	
Number of Submitted FAFSAs	
Number in total entering class (all undergraduates) subject to federal verification	

3. Student Success

First Year Retention (entering class fall, 2014)	
Sophomore-to-Junior Retention (2014-2015)	
4-year Graduation Rate (entering class fall, 2011)	
6-year Graduation Rate (entering class fall, 2009)	