



# Admissions and Records Service Model Redesign

## AACRAO Consulting Report for Los Rios Community Colleges District

November 2021 – February 2022

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## Project Overview

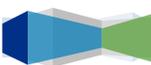
Los Rios Community College District (Los Rios or LRCCD) engaged AACRAO Consulting to provide long-term assistance in the transformation of its admissions and records service model.

Through a consultative process, AACRAO Consulting was to develop a service model that will leave LRCCD with greater effectiveness and efficiency to better serve students, staff and all constituents into the future. The overall goal of the development of an admissions and records service model was to provide seamless service to students that is both equity-minded, student-centered and maximizes efficiencies in processes, technology, and staffing in conducting admissions and records related processes.

Project deliverables included conducting reviews of the admissions and records related processes at LRCCD's four colleges (American River College (ARC), Cosumnes River College (CRC), Folsom Lake College (FLC), and Sacramento City College (SCC)); providing recommendations for enhancements or improvements in processes, practices, policies, staffing, organizational structure, and use of technology that reflects an equity-minded and student-centered approach; developing a transition plan for a service model for the Admissions and Records Office in collaboration with Los Rios project stakeholders, including, but not limited to, classified staff and supervisors, deans, counseling faculty, articulation officers, instructional department representatives, vice presidents of instruction and student services, and diverse students; and finally, as part of phase two of this project, providing assistance and guidance in the implementation plan for the recommendations and the service model.

### **Phase 1 Deliverables: Admissions and Records Offices**

The consultation was conducted in two phases to accomplish the deliverables noted above. This report addresses the first phase of those deliverables. The following review deliverables were carried out at each of the four colleges. This report documents processes and functions in order to inform the development of an admissions and records service model that achieves

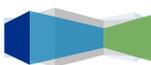


greater effectiveness and efficiency across LRCCD to better serve students, staff and all constituents. The development of the recommendations emerged from the following activities:

- ⇒ A review of all processes, procedures, policies and functions within the Admissions and Records Office.
- ⇒ A review of processes and practices for efficiencies and to ensure that they are aligned with best practices in higher education.
- ⇒ A review of the use of technology in admissions and records processes with a focus on maximizing the use of current systems.
- ⇒ A review to improve customer service, workflow, and communication to and with future students, families, supporters, schools, colleges, and with internal and external stakeholders.
  - Identify functions and processes that would result in greater efficiencies and service delivery if centralized and which services should be maintained at the campus level.
  - Identify how or if changes to existing automation or additional automation could enhance customer service and communications processes.
- ⇒ A review of how the offices are organized internally and relates to external departments (including the other colleges and education centers) to improve efficiencies.
- ⇒ An evaluation of staffing in the offices in terms of levels, roles, deployment of responsibility, reporting, and to ensure admissions and records processes are maximizing human resources. A further review of training and professional development resources and opportunities for staff.

### Pre-Interview Activities

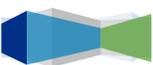
AACRAO Consulting conducted extensive research in advance of the consultation to understand the unique needs and circumstances of each college. The Discovery Phase began with several web conference meetings in which the AACRAO consultants and the Los Rios Project Leads reviewed the goals of the engagement, established the consultation schedule, and reviewed the list of requested background materials. Background materials were provided to the consultants in advance of the start of the interview phase and continued throughout the engagement.



## Interview and Meeting Activities

The virtual interviews focused on the areas included in the project summary above and the following:

- ⇒ Conducted web conference meetings with the Project Leads as needed to confirm the goals and provide updates about the virtual visits.
- ⇒ Conducted web conference meetings with each Admissions and Records offices and designated leads to confirm project goals and details of the interviews. See Appendix A for the detailed schedule of meeting dates and attendees.
- ⇒ Conducted focused interviews with a broad range of each campus' stakeholders to gain an understanding of the admissions and records operational practices. These interviews included academic and student affairs administrators, faculty and staff charged with responsibility for admissions and records operations, and students. See Appendix A for the detailed schedule of meeting dates and attendees.



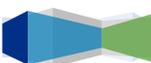
## Executive Summary

The Los Rios Community College District (Los Rios or LRCCD) is the second-largest community college district in California, serving the greater Sacramento region. LRCCD is made up of four colleges, six education centers, and specialized workforce and economic development programs for local businesses, governments, and organizations. Los Rios sought to engage AACRAO Consulting to provide long-term assistance in the transformation of its admissions and records service model. The overall goal of the redesign for the Admissions and Records offices was to provide seamless service to students that is both equity-minded and student-centered and maximizes efficiencies in processes, technology, and staffing in conducting admissions and records related tasks to consistently serve all members of the LRCCD.

Through a review of campus and district related data, websites, policies and forms and through extensive interviews of students, staff and faculty across all four campuses and members of LRCCD office, a number of key observations were made from which a series of recommendations emerged. During this review, many strengths within the Admissions and Records offices and within its processes across all four campuses came to light. Examples include centralized admission application; dedicated and devoted staff; accessibility of key student forms on-line; redesign of district and campus websites; ability for students to study across multiple campuses; and the collection of data, both at the campus level and district wide.

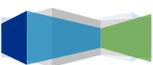
With these and other strengths in mind, AACRAO Consulting determined the current state of the admissions and records functions, processes and policies to then propose a number of recommendations that, if implemented, will result in greater effectiveness and efficiency in the delivery of these functions across LRCCD. The recommendations are categorized as five key opportunities for change. These include the following:

- ⇒ Communication
- ⇒ Technology and Data
- ⇒ Personalized Student support



- ⇒ Centralizing Business Processes Across LRCCD
- ⇒ Organizational Structure, Staffing and Implementation Phase

The overall goal is more equitable, efficient, consistent and sustainable service to students, staff, faculty and all Los Rios constituents.

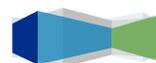


## Primary Observations – Strengths and Opportunities

Upon the completion of both the discovery phase and the extensive interviews of students, staff, faculty and administrators across all four campuses and with members of LRCCD office, a number of strengths and opportunities emerged. The Admissions and Records offices provide quality one-on-one service to students and to staff and faculty. It was repeatedly heard from both students and from other staff and faculty how willing the Admissions and Records staff are to support students and immediately problem solve any situation. When on campus, other staff and faculty would walk students over to the office and know that they would not be referred further. Instead, the Admissions and Records staff would be the last place the student would need to explain their issue in order to resolve the matter. While this personalized support is admirable, an opportunity exists to improve certain practices, procedures and technologies to reduce the numbers of exceptions that the Admissions and Records staff are handling and thereby increase their opportunity for more transformational work with students.

Another strength within the Admissions and Records offices has been improving the accessibility of forms on-line for students. While brought on by the need to work and learn remotely, improving access to forms for students on-line was seen by many as a welcome addition to the suite of services offered. However, student-facing forms without electronic workflow for staff on the back-end has not made the processes more efficient and timelier. It was raised repeatedly by those interviewed that student requests for updates or changes to their record often take weeks to process. Furthermore, some of these requests, such as requests for advanced placement and transfer credit, are not front-ended at the time of admission but instead back-ended as part of the registration and graduation processes. As a result, students are waiting too long to enroll in a course where advanced placement is needed or not receiving their graduation confirmation until three to four months after they have completed their final semester.

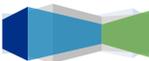
Steps have already been taken to improve the back-end workflow for petitions and there is an opportunity to do so with other forms as well. In addition to improving the back-end workflow



for electronic forms, written procedures should also be included to ensure uniformity between the campuses for a consistent student experience. Finally, moving to more front-ended processing for prior learning assessment would greatly improve both the registration and graduation processes for students.

LRCCD, with four Colleges in different communities, allow students to enroll in courses at any one of their campuses. Moving to remote learning has further supported students studying in a multi-campus environment. Many students expressed appreciation for being able to “pick and choose” courses at times they prefer and during the semester they prefer as well. That said, students expressed frustration that they needed to repeatedly provide, to Admissions and Records, certain documentation in support of their cross-campus enrollment even though their original or “home” campus already received it. Students and staff/faculty further expressed that there was not always consistency in the policy interpretation across the campuses by Admissions and Records (such as Academic Standing holds) which caused some confusion for students. There is an opportunity, through the use of such existing technologies (OnBase and Peoplesoft), to streamline student registration mobility across LRCCD by ensuring that when a document is submitted to a student’s record it does not have to be submitted again. Furthermore, interpretation of Admissions and Records related policies and deadlines should be reviewed with the intention of centralizing, where possible, across LRCCD. Centralization would include aligning or making more consistent processes, practices, deadlines and policy interpretation.

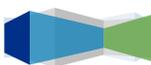
A strength of LRCCD is that they are a set of four distinct yet interconnected colleges within the Los Rios community. As noted above that affords students enrollment flexibility and the potential for increased service support. An opportunity does exist to improve the delivery of service by examining how functions and processes can be more aligned across LRCCD. Centralization of certain procedures, practices and policies within the admission and records cycles could reduce redundancies, increase response time, and improve equity minded services to students as well as to faculty and staff.



Campus and district websites are critical components to communicating timely information efficiently and effectively to students but also to staff and faculty who support students. Each campus website recently went through a redesign to look more alike and to streamline content. The project was mostly successful; however, there are some opportunities for improvement in usage and content, focused on the ease of finding and collecting information. Use of other technologies, such as a Customer/Constituent Relations Management (CRM), is also an opportunity to improve communication with prospects and current students. A CRM would also significantly increase the data collected about students to create more customized communication.

While technology plays a critical role in transitioning and supporting students along their learning journey, so does having qualified, trained staff with clear expectations for the roles. As noted above, staff in Admissions and Records are very student centered in their approach to the service they provide. An opportunity to improve does exist, however, in how the offices are structured, how staff are trained and the expectations that are set out within each job description. The end goal is to decrease transactional exceptions and increase the opportunity for staff to provide transformational experiences for students. This type of interaction can lead to greater student satisfaction and student persistence.

Another strength is that LRCCD Office has taken the lead on a number of admissions and records related projects to improve the experience for students and to better serve faculty and staff at each of their campuses. Projects already underway include “Other Term Course Improvements” and the “Graduation Petition Improvement Project.” LRCCD has also identified eight other projects requiring attention. In addition to the recommendations identified in this report, and the projects underway, those projects that have been identified should continue to be moved forward for implementation. These technology related projects can result in significant improvements for students and therefore, LRCCD is wise to prioritize them for implementation.



## Primary Recommendations – Leveraging Opportunities

As a result of completing the strengths and opportunities review for Los Rios (through the analysis of data and other background material and through extensive interviews across LRCCD), five primary categories of recommendations emerged that will guide the admissions and records redesign. These are:

- ⇒ Communication
- ⇒ Technology and Data
- ⇒ Personalized Student support
- ⇒ Centralizing Business Processes Across LRCCD
- ⇒ Organizational Structure, Staffing and Implementation Phase

Each of these areas are detailed in the sections below and include recommended timelines for executing the recommendations.

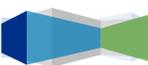
### Communication

#### Observations

##### **Websites**

There was much discussion about the new websites for both Los Rios and the individual colleges. Each website recently went through a redesign to look more alike and to streamline content. The project was mostly successful; however, there are some usage and content issues that were repeatedly mentioned during the interviews, most of which focused on the ease of finding and collecting information.

The consultants observed many positive attributes of the website, including how admission-centric the site is and how it is easy to read. The student experience seems to drive the layout, and admission information is relatively easy to find via the drop-down menu or the links within the home page. The institution should also be commended for having a mobile friendly version



and the ability to translate the individual college pages into various languages (however, this is not easily found or known, and the consultants recommend enhancing or promoting this functionality).

### **Brochures and Printed Materials**

It was pointed out that there are no printed materials mailed as part of the admission process. And, while this review is not about recruiting more students, a successful onboarding and student service experience can be enhanced by information being shared with students in multiple formats.

### **Communicating with Students, Staff and Faculty**

Multiple students, faculty and staff identified ongoing communication issues with Admissions and Records, specifically confirmation of received materials, updates on petitions, and completion of tasks. This key function of the office - keeping constituents informed – is the foundation of good student service and enhancing the student experience.

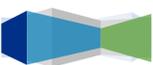
Additionally, there was much conversation about the individualized communications that drive the business process. More often than not, the consultants heard that something was addressed or accomplished because, “I picked up the phone and called this person.” This approach, while important and often vital, needs to be re-examined as it is very time consuming and dependent on reaching the “right person at the right time.”

### **Communication as a Collaboration Tool**

It was observed that, until recently, there was no formal structure to ensure ongoing communication between the individual colleges. A strong, internal communication network is essential to innovation, consistency, compliance, and professional development.

### **Communicating via a CRM**

Los Rios does not utilize a CRM to manage incoming or outbound communications with students. As such, there is no mechanism to know what is being shared with students, when



students are asking questions, or what has been told to a student post-inquiry. This issue is more prevalent when it is realized that students are attending more than one of the colleges, and these colleges have no way to cross share student interactions.

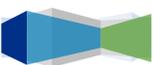
## Recommendations

### **Websites**

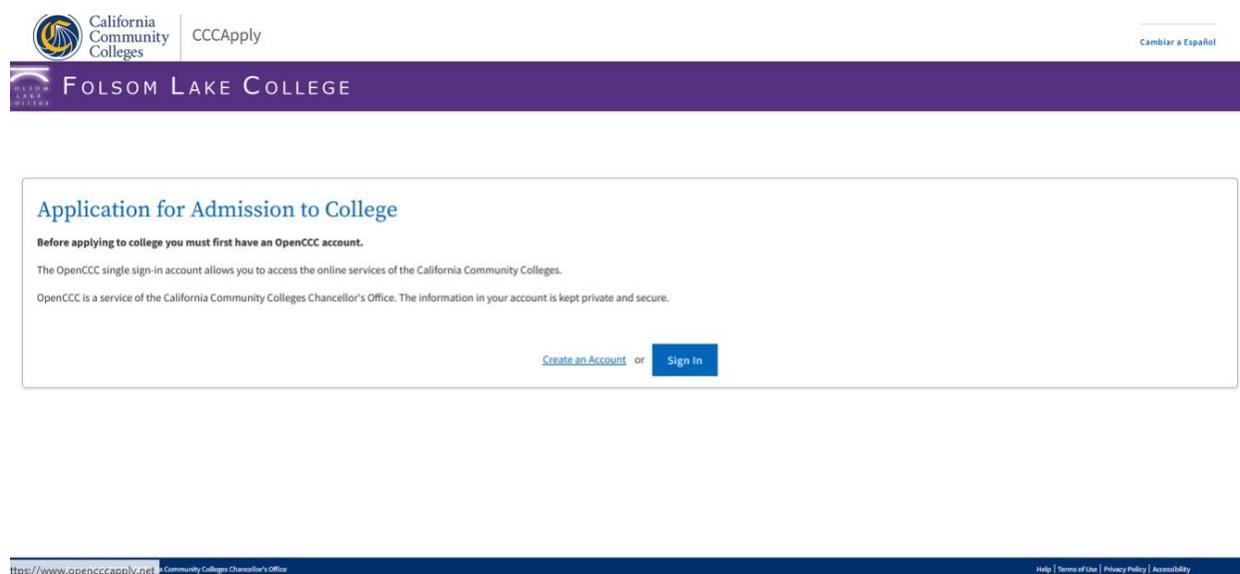
All admission and enrollment related webpages should be reviewed to ensure that they speak “student.” In many cases, the common default is to use nomenclatures, acronyms and higher education verbiage when sharing information because that is what staff and professionals are accustomed to. However, students need simpler and well-defined content.

The search functionality needs to be expanded. For example, when searching for “VA,” only the Veterans Success Center and The Bookstore Line of Credit web page is found. It was reported that it is easier to use a google search than to use the school search function.

The “Apply” icon on each of the individual college sites goes directly to the OpenCCC account page, bypassing any information about how, when, or why to apply. Likewise, the OpenCCC account page shows no information on how to get help. On any page that could cause a technical issue, a contact name, email, or URL should be included.



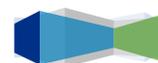
**Figure 1 – Example of Apply Website**



ARC was the only college page to have a front and center “Request More Information” link. This form is a simple, easy way to capture prospective student data, and should be expanded to CRC, SCC and FLC. That being said, the current ARC form should be expanded to include some fields that can be used to manage and grow the prospect pool, including potential major, start date and phone number, at minimum. Other Requests for Information typically include what kind of student they are, a mailing address, and some way of gathering what type of information they are seeking. Examples include Miami Dade College (<https://your.mdc.edu/inquiryform1/>), the Community College of Baltimore County (<https://ccbcmd.askadmissions.net/emtinterestpage.aspx?ip=degree>), and Ivy Tech Community College (<https://forms.ivytech.edu/f/rfi>).

### **Brochures and Printed Materials**

It is recommended that Los Rios design three printed mailings for students. The first would be a recruitment piece, which explains (1) the structure of LRCCD, and which programs are offered at which campuses; (2) the process of applying; (3) financial aid and scholarship opportunities; and (4) why students should attend Los Rios. It is recommended that this brochure be



published in multiple languages, and be made available throughout LRCCD (high schools, libraries, churches, etc.).

The second piece should complement the admission process and include information on what to do post-admission. This would include information on placement testing, orientation, advising, repeating information about financial aid, transcript submission, etc. This brochure/document is transactional in nature and would align with the admission/enrollment steps available on the website.

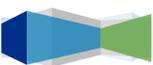
The final piece should be a student focused piece and be designed for each college with multiple students in mind. Content should include information on special programs (i.e., PUENTE), academic and student services, parking, email, etc. The goal is to help students find their place at Los Rios. It is noted that many faculty commented that this information is not getting into the hands of students, and many hours within their initial class time is being spent covering this information.

Each of these publications should also be available for download as a PDF. Likewise, they should all be designed with the student in mind; in fact, it is recommended using a student-focus group to determine the content.

### **Communicating with Students, Staff and Faculty**

A universal reply by deadline should be established. For example: “All emails and phone calls will be responded to within 72 business hours.” All staff within Admissions and Records, including those at the outreach centers and regardless of location, should be required to adhere to this policy. If times need to be expanded, an out of office reply should indicate as such.

Automatic emails should be set up to confirm receipt of an email to generic accounts where documents and other materials are typically sent. This email should indicate that the document



was received, set an expectation for when it will be processed, and provide information on how to get help if no future action is taken.

Within Peoplesoft, an email should be triggered with 3C's functionality when a particular process is completed. This is an engine that picks up triggers within the system and assigns events (like communications). Information on this process can be found at:

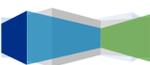
[https://docs.oracle.com/cd/E40059\\_01/elm92pbr0/eng/elm/eawl/task\\_TriggeringEmailCollaboration-ae6ebe.html](https://docs.oracle.com/cd/E40059_01/elm92pbr0/eng/elm/eawl/task_TriggeringEmailCollaboration-ae6ebe.html).

Each Admissions and Records office should publish a list of who to contact (and provide a backup name) for what service. This person should be the key point of contact for that function, and whenever possible, all calls and inquiries about that function should be referred to that individual. Further, it is often recommended that individual emails not be used, as this can cause problems if a person is out or leaves the institution. Rather, if they do not already exist, a generic email should be established for primary functions (e.g., [gradpetitionarc@losrios.edu](mailto:gradpetitionarc@losrios.edu)). These, too, should be consistent throughout LRCCD.

### **Communication as a Collaboration Tool**

It is recommended that a more formalized structure be developed to routinely bring together functional units from across LRCCD. While the meetings themselves do not need to be formal, team charges, deliverables and accountabilities need to be codified and measured. The list of functional teams includes, but is not limited to:

- Supervisors of Admissions and Records
- Transfer Credit Evaluators
- Special Populations: Dual Enrollment/ACE, the Incarceration Programs, and International Students
- Military and Veteran Services
- Front Line Staff (those who answer the phones, initially see students, etc.)



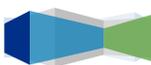
These teams need to focus on shared experiences, identifying and problem solving on current and potential issues, the use of technology, regulations and policy, changes to student demographics, professional development opportunities, just to name a few. They should meet regularly to ensure ongoing momentum and change.

### **Communicating via a CRM**

A CRM is needed to capture all communications and conversations with students. The purchase of a CRM, and how to implement it, is discussed further in the technology section of this report. This section focuses on how to use the CRM to manage student engagement.

Recommendations for Outbound Communications include the following:

- The CRM should become the clearinghouse for routine, controlled messaging to all students. Any student facing office with routine emails to students should have those sent via the CRM. This includes students in the admissions funnel and those enrolled at the institution. Examples of these communications may include notifications about deadlines, marketing/recruitment materials, financial aid disbursement, tuition payment options, etc. Once included in the CRM, any staff member with access to the program, from any campus, should be able to see what has been shared with the student (and if they opened it).
- All incoming inquiries from students should be tracked in the CRM. This includes any phone calls, emails, chat bots, or walk ins (and other forms, as applicable). Likewise, the corresponding or new responses or follow ups should be documented. Depending on the software, the CRM can also be used to share next steps or follow ups with other staff or faculty within the system to further enhance the student's experience.
- For students in the inquiry/prospect/applicant and admitted stages, a reactive CRM communication flow should be developed. This flow is a multi-layered, individualized and responsive marketing tool that will provide both transactional and marketing materials to students based on various characteristics, timelines, and requirements. As examples, a communications flow should be established for those students who have



applied for admission but have not accepted their admission, for international students who have applied but have not submitted their I-20s, or for equity seeking students to talk about specific student clubs and organizations at the institution.

Additional uses for the CRM as a recruitment and retention tool are explored in the technology section of this report.

### **Timeline for Recommendations**

- ⇒ Website changes should be made within 3 – 6 months.
- ⇒ Brochures should be developed for use to begin in the Fall 2022.
- ⇒ Communication improvements across the campus should be made within 1-3 months and the setting of automatic emails should be completed immediately.
- ⇒ Communication as a collaborative tool should be made within 1 – 3 months.
- ⇒ Communicating via CRM ongoing, 3-6 months for analysis and purchase; 6-9 months for implementation.

## **Technology and Data**

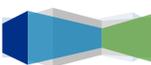
### **Observations**

#### **Expanded Use of OnBase**

Los Rios has been using OnBase, by Hyland Software, as their document imaging system. The program is much more than just a way to store student documents (it allows for workflow integration), and LRCCD will find new opportunities and efficiencies by dedicating resources to expand the use of the software, and access within it, across all the colleges.

#### **Use of a CRM**

It is very clear that Los Rios needs a CRM solution that focuses on enrollment and retention functions, including outreach, admission, advising, registration and graduation processes. While most CRM's are powerful marketing tools, enrollment management utilizes a CRM for considerably more, including communication and tracking interactions with students, assessing applications, querying data for enrollment projections, recruitment and outreach, event



planning, advising, appointment management, and more. A CRM can significantly impact overall admission yield and support student persistence efforts.

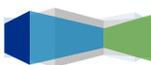
### **Use of Data**

There were many conversations about the use of data for accountability, planning and reporting purposes. Data is collected and stored at both the college and district-level, and there is a highly efficient and capable institutional research team. Data standards or definitions are available. In general, the institution has a lot of data available, but there does seem to be some unwillingness at the campus level to collect data that is not easily obtainable. Examples include how many phone calls are answered in admissions and records each day; how many emails are responded to; how many petitions are completed (and their completion rate compared to time); etc. These data points are needed to track and set benchmarks for workload and staffing levels, customer service, and as data sets for technical discussions. Each college must adapt to a data-driven culture to ensure success and improve the student experience.

### **Peoplesoft**

Los Rios primarily tracks student attribute data in Peoplesoft through holds on student accounts. This is a mismatch of usage. Holds are a manual, complicated, often hidden feature of Peoplesoft that should not be used as a long-term solution for tracking student attributes. Further, they should not be used without clearly identifying the need, process, and upkeep of the function.

With a large number of students attending classes at multiple campuses, it is important that faculty and staff across LRCCD have access to student information. Currently, access is limited, for most, to a single campus only. This inhibits the student experience in a variety of ways, including lack of important enrollment information such as courses taken, financial aid eligibility, transcript evaluations, and more. Expanded access within Peoplesoft across LRCCD is needed.



Service Indicators were identified as a tool for monitoring and tracking students, albeit there was some confusion about terminology and usage. Service Indicators can be extremely helpful to communicate next steps for students, and to control certain student functionality, but only if they are used consistently and correctly.

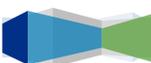
## Recommendations

### **Expanded Use of OnBase**

LRCCD should expand its use of OnBase to improve document imaging and storing, automation and workflow, and to improve access to student records. To begin, LRCCD should implement a business process management approach. By doing so, OnBase can be utilized to move documents throughout LRCCD (eliminating multiple copies, emailing documents, eliminating any potential FERPA violations, and more). A petition, for example, can be uploaded into OnBase, and automatically be moved through a workflow for the various approvals and notifications. Within the system, dashboards and alerts can also be utilized to identify when items are taking too long and where roadblocks exist. This implementation will solve many of the issues identified during the interviews, including a lack of knowledge about where documents are in the approval process.

Additionally, it was noted that Los Rios is currently redoing their electronic forms. OnBase has the capability to do this, and their forms will be seamlessly integrated with the student record and be available for workflow management. This option should be considered if it will eliminate additional steps and provide more automation.

Universal access to documents, if configured correctly, can be a key solution to timely process management. Using OnBase, the campuses can coordinate functional processes to assist each other during peak times. For example, transcript evaluations or petitions can be cataloged, searched, stored, and tracked so that they can be processed at any campus when the need arises. Individual clerks and evaluators can use the tool to see when they may need to request additional processing support. This process is often referred to as Case Management.



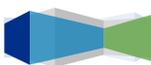
This same expanded access will allow counseling faculty and other support staff to see student documents whenever a student crosses campus locations. This will eliminate the need for students to submit multiple documents to multiple campuses, fill out identical forms, etc. All of these efficiencies will enhance the student experience and eliminate duplicate work, costs, and time.

OnBase can be (if not already) integrated with Peoplesoft and the new CRM. This process will streamline processing times, expand opportunities for quality assurance and data analysis, and provide valuable and consistent knowledge base for staff and faculty.

### **Use of a CRM**

Currently, LRCCD does not have a system that will meet the needs of the Admissions and Records Office. The same statement applies to supporting the Outreach office. A comprehensive CRM is needed. As an initial step, the (outreach) admission and records leadership team should identify their needs within a CRM. To accomplish this, having discussions with other schools that have implemented a CRM, meeting with the existing vendor, attending workshops, etc. is recommended along with exploring <https://edtechconnect.com/> for additional information. Functionality to consider includes:

- Inquiry, Recruitment and Admission: Territory and Recruitment Management, Application Tracking, Application Dashboards, Event management, appointment scheduler
- Communications and Forms: Text messaging, Request for Information, Online Petitions and Forms, Email Sending and Tracking, multi-leveled and responsive marketing campaigns, Secondary Application Forms, email integration, etc.
- Communicating and Access to/from Retention and Advising: Advising Appointments, Early Alert Systems, Enrollment planning and tracking, transcript evaluations, student engagement, milestone tracking, orientation, etc.

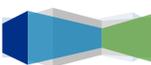


- Communicating and Access to/from Financial Aid and Records: Petitions, Degree Audit releases, Financial Aid awards, scholarship applications, re-enrollment, exit interviews etc.
- Data Analytics: Application Funnel and Enrollment funnels, Financial Aid dashboards, course enrollments, phone calls and email benchmarks, etc.

Once this list is determined, it should be compared to the new CRM to determine potential opportunities and gaps. These conversations will need to involve a team of people, including Admissions and Records, IT, recruitment/outreach and marketing. If the purchased CRM will meet these needs, then an implementation team should be established, and the project should be given high priority. If the new CRM does not meet the needs, leadership will need to determine the appropriate solution. In all scenarios, it is strongly recommended that a capable, useable CRM be implemented for the outreach and enrollment functions of LRCCD.

Utilizing a CRM is not a short project. LRCCD should be committed to providing the time and resources to successfully design, implement and maintain the software. If/when LRCCD is ready to implement a CRM, it is recommended that a full-time functional lead be hired, someone with experience using and managing the software, to be the project lead.

How to use the CRM as a marketing and communications tool is explored in the Communications section of this report. While not entirely within the scope of this project, the CRM is, at its core, a powerful data warehouse, and can be used to improve application, admission, conversion and yield rates for new students. CRM data analytics can improve processes, transparency, and communications, which will greatly improve the student experience. Examples include using a CRM to trigger key forms of communication when a student is at risk of not persisting in their program of study and setting timely reminders to students to complete certain transactions like payment of fees or deadline to apply for bursaries.



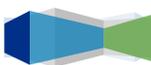
## **Use of Data**

Two priority data-focused recommendations formed from the discovery and interview processes. First, the institution needs to start collecting data that is relevant to measuring the student experience within the Admissions and Records functions. Currently, no data is collected about the number of students seen, emails received or returned, petitions processed, the type of issues being solved, etc. These, and many other indicators, help leadership determine student satisfaction, employee accountability, and areas for improvement. A CRM will provide some of this data, but only if properly implemented and consistently used. In the short term, it is recommended that (a) supervisors begin tracking key indicators (noted above) of student engagement in the office (these need to be identified by the supervisors and leadership); (b) a student satisfaction survey be utilized to obtain real time feedback from students and constituents; (c) benchmarks are set to measure future success; and (d) comparative data across the colleges is used to determine staffing and workload needs.

The second recommendation stems from an often-repeated comment about equity seeking populations. These populations are becoming more prevalent across the entire LRCCD, but most of their unique processes are housed in Admissions and Records. Because there are differences in application type and how data is stored in Peoplesoft, tracking and comparative data across these populations is not available. This deficiency causes multiple challenges in reporting and planning when it comes to meeting students' needs or removing barriers to admission and persistence. According to LRCCD office this project has been submitted but has not yet started.

## **Tracking Students and Access in PeopleSoft**

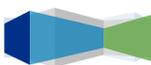
Leadership should identify a new way to track unique populations within Peoplesoft. Based on best practices, Admit type works best (e.g., FTF, first-year student; TRN Transfer; VTT, Veteran Transfer; DEF, Dual Enrollment Freshman, etc.). This process should be vetted through Outreach, Admissions and Records, Counseling, Institutional Research and Financial Aid, as each



of these areas will need to update individual data collection, analysis and processes. The use of enrollment holds in Peoplesoft to identify unique populations should be phased out.

An audit of current service indicators used to block enrollment, identify missing documents, indicate financial issues, etc. should be undertaken. Each service indicator should be reviewed to determine (a) if it is still needed; (b) what the process is to add and remove the indicator; (c) if the proper holds/limitations are in place; and (d) if students should have the indicator removed with reason. Then a naming convention should be implemented. Each indicator should have a guiding document that includes a clear description, potential term usages and limit, negative or positive hold, issuing office/responsible party, and a QA process. The description of each indicator should be clear enough that students and the community know what the indicator is being used for, and how to follow up to learn more information (i.e. – IEN, Initial Enrollment Hold, student cannot register for classes until this hold is removed by an academic or faculty advisor. Students should contact their adviser using E-Services to set up an appointment.) User access to adding and removing the indicator should also be reviewed. In conjunction with the recommendation to use Admit Type instead of service indicator, relevant population categories should be removed. All documentation should be universally accessible and training on how to use the codes should be conducted. A periodic review of codes, and students with the indicators, should be completed.

It is also recommended that leadership explore ways to expand Peoplesoft access if even just read-only, across LRCCD, as needed and as appropriate. This may require the expansion of or redefining roles within the system, and it certainly will require onboarding and ongoing training. Doing so will require universal definitions, codes and field usage; this will either need to be implemented or a crosswalk will need to be developed. Universal access is only successful if everyone interprets and/or uses the data in the same way.



## Timeline for Recommendations

- ⇒ OnBase ongoing; project should begin within 1 month and be fully implemented in 6 months.
- ⇒ Use of CRM ongoing; project should begin within 1 month of a CRM being purchased and be completed within 1 year.
- ⇒ Use of Data this project has been submitted to LRCCD office but has not yet started. Not a priority project but should be a focus of work within 6 – 9 months.
- ⇒ Expanding Peoplesoft access 1 – 3 months.

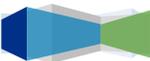
## Personalized Applicant and Student Support

### Observations

A goal of equity-minded, holistic and personalized support is to ensure all inquiries, prospects, applicants and students feel their own sense of belonging within the LRCCD before, during and after applying for admission and upon becoming a student. Belonging takes staffing, time and the removal of barriers.

What was heard across many of the interviews regarding equity seeking applicants and students can be summarized as *access without success is neither access nor success*. Support for applicants, that is well coordinated and timely and that anticipates barriers with the intent to remove or at least reduce them, is especially critical to ensuring access success for equity seeking applicants. Applicants with English as an additional language, dual enrolled/ACE applicants, applicants from the military, first generation applicants, African-American applicants and Latinx applicants, already face many barriers to applying to college in addition to the ones that may appear during the admission process.

During the interviews across all four campuses the strength within Admissions and Records in providing just-in-time, personalized support for Los Rios students was heard repeatedly. It was also noted that as students successfully make their way along the learning journey from inquiry to prospect, to applicant to registrant, “hand-offs” between the Admissions and Records offices



to the Counseling Offices, and sometimes back to Admissions and Records, works well but it is extremely time consuming and dependent on strong personal relationships between the staff and faculty. Absent certain people and key working relationships this process could be compromised or even absent.

Ensuring that applicants and students have their transactional needs met in a timely fashion is critical. But so is providing applicants and students with transformational experiences when interacting with the staff. It was often expressed that staff spend considerable time helping applicants and students navigate exceptions rather than having time for more developmental and transformational interactions with them. Tufts University describes transformational student experiences as follows:

Transformational experiences can be defined as experiences that fundamentally challenge a person’s assumptions and preconceptions, as well as their beliefs and values, affecting how they understand themselves, others, and the world.<sup>1</sup>

Exceptional learning moments do not just happen within the classroom. They happen every time an applicant and then student interacts with members of our learning community. The goal of transformational learning experiences is holistic student development, and all Admissions and Records staff have a role to play in that transformational experience for applicants and students.

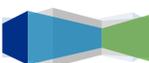
## Recommendations

It is the whole person that must be supported in order to achieve greater applicant access and increased student success. Figure 2 below depicts the components of holistic student development.

### **Figure 2 – Holistic Applicant and Student Development**

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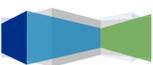
<sup>1</sup> Retrieved from the following site: <https://provost.tufts.edu/wp-content/uploads/Theme-2.pdf>



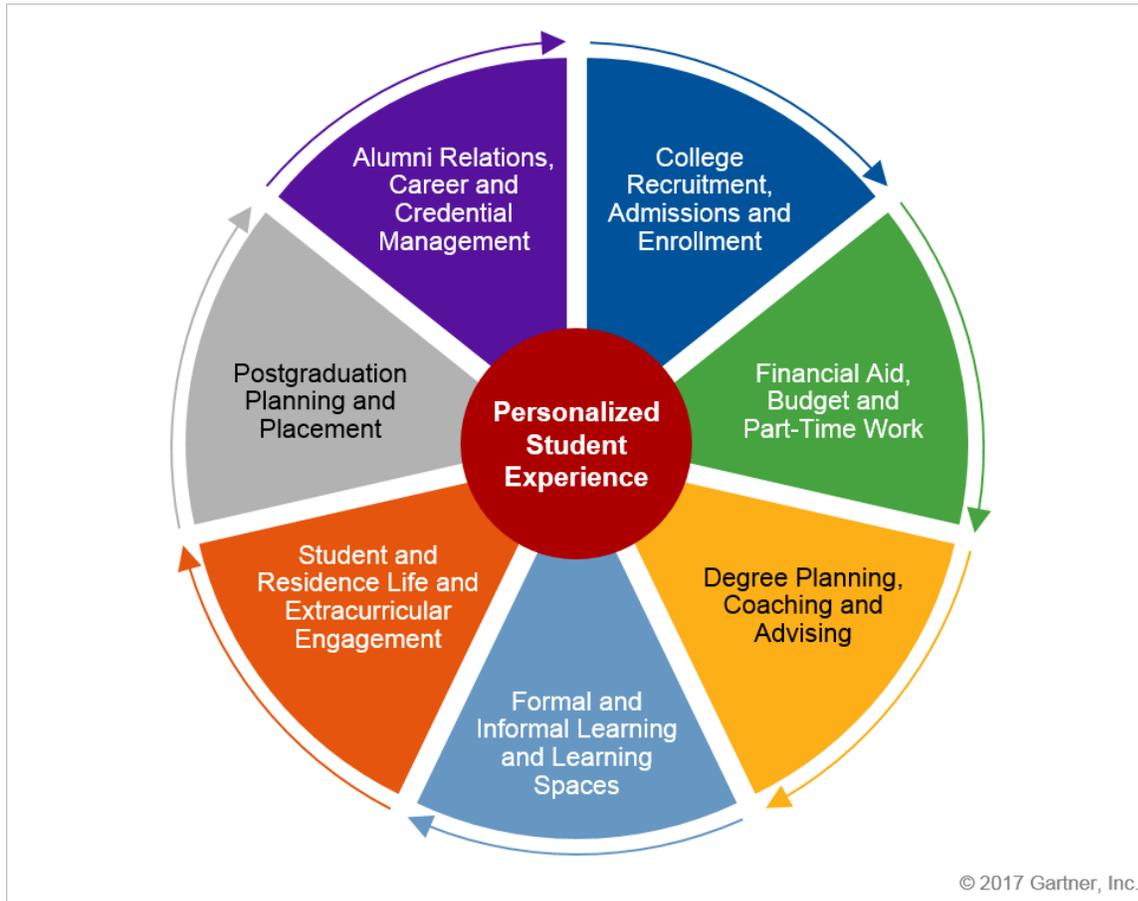


Adapted from: Office of Student Affairs,  
Hong Kong Baptist University

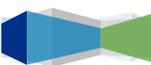
To accomplish this, as Figure 3 notes below, holistic development, especially for equity seeking applicants and students, takes a total community effort and should not be the sole responsibility of a few special population offices.



**Figure 3 – Personalized Applicant and Student Support**



It is recommended that, by centralizing, streamlining and automating transactional processes across LRCCD, and leveraging existing technologies (OnBase and Peoplesoft) as well as new technologies (CRM), Admissions and Records staff will be less consumed by transactional exceptions and more focused on transformational personalized support for applicants and students. This approach will also foster more opportunities for Admissions and Records and Counseling to “hold hands” rather than “hand off” students during the critical transition from becoming an admit to becoming a registrant and then to becoming a graduate and/or transfer student. The implementation plan (noted below) is intended to assist in improving equity seeking applicant access and equity seeking student success.



## Timeline for Recommendations

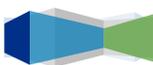
The timeline for allowing more transformational service for applicants and students to occur will be dependent on implementation of recommendations noted above for the use of OnBase, improving user access levels within Peoplesoft, and centralizing admissions and records functions. However, this can be achieved more quickly by taking immediate action on the recommendations contained in the Implementation Plan section noted below.

## Centralizing Business Processes Across LRCCD

### Observations

A student's college journey often begins with the first step of applying for admission. This step triggers a number of additional transactional processes that continue throughout the student's learning journey. These may include submitting high school transcripts; applying for advanced placement; applying for transfer credit; submitting other supporting documentation for the admission application; requesting an exception to a prerequisite or co-requisite; applying to register in a full class or late add to a class; and applying for graduation, just to name a few. In some cases, such as with requests for advanced placement or transfer credit, the transaction is often not carried out by Admissions and Records as part of the application process. Instead, it occurs during the registration period (when standing is needed to enroll in a course) or during the graduation cycle (when course substitutions are needed to complete a credential). For students, this slows the transaction down considerably and can lead to duplication in course enrollment for courses later awarded as transfer credit.

For many students in LRCCD these transactional steps also have to be repeated when they wish to take courses at more than one of the four campuses. This can be time consuming for the student and delays their desired outcome. For the staff at the receiving institution(s), it is a duplication of effort and can lead to differing interpretations of policy and timelines.



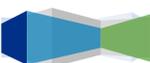
## Recommendations

By leveraging the implementation structure (see section below), it is recommended that admission and records related procedures, policies and processes be examined first across LRCCD. This means reviewing the use of common forms, adhering to common deadlines, and front ending all advanced standing requests as part of the admissions process. By leveraging the recommendations about the use of OnBase and addressing levels of user access within Peoplesoft (see sections below), it is further recommended that admission and records processes be centralized across LRCCD to allow for greater enrollment mobility between the campuses for students. Centralizing would include, but is not limited to, collecting personal student information once, regardless of the number of campuses a student attends, and making that accessible across LRCCD; evaluating advanced standing and recording the outcomes in centrally accessible tables, in addition to on the student's record, to allow for a triangulation approach (where the receiving college in LRCCD determines the equivalency for the transfer course and another college in LRCCD can also determine the equivalency by looking at what the receiving institution already assigned to it as equivalent); and where possible adhering to a common set of deadlines for processing student transactions. This may further help LRCCD realize the use of one form (with multiple petition types) thereby easing the confusion for students as well as faculty and staff. It could also allow for the form to be made available in more than one language.

Any further steps to centralize the Admissions and Records offices across LRCCD should be considered within the recommendations and implementation noted below.

### **Timeline for Recommendations**

The timeline for centralizing the admissions and records functions across LRCCD will be dependent on the implementation of recommendations noted below for the use of OnBase and improving user access within Peoplesoft. However, this should be seen as a top priority and can be achieved more quickly by taking immediate action on the recommendations contained in the Implementation Plan also noted below.



## Organizational Structure, Staffing, and the Implementation Plan

### Observations

LRCCD currently has a decentralized organizational structure; that is, they are college based instead of district based. Only recently has a district wide interim Director of Admissions and Records been identified. This is an important first step in changing the cultural, efficiency, and success of the Admissions and Records offices, and for improving and streamlining the student experience.

It was observed that many staff descriptions were unclear but staff worked well outside of the descriptions. Yet staff often worked on multiple tasks simultaneously, which sometimes hampered their ability to concentrate on or master a single responsibility or function. While it is important to have back-up functionality within an office (thus learning multiple tasks at once), that should only be utilized when/if needed.

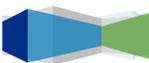
According to LRCCD, new position descriptions are being worked on, and therefore, the following recommendations should be considered during that process.

### Recommendations

#### **Structure**

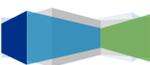
Three realities drive the District's decision on structure.

- Currently, outreach (defined as recruitment of students and partnerships) is a separate office from Admissions and Records. This model currently works, although there is some question about where responsibilities start, stop and overlap. If we explore the student journey, there are certain milestones which move a student from one office to another. The two most common include being admitted/accepting admission (moving from admission to orientation/advising) and enrolling in classes (moving to Records and Registration). Within Los Rios, these lines are blurred, and it is not clear they are uniform across all the colleges.



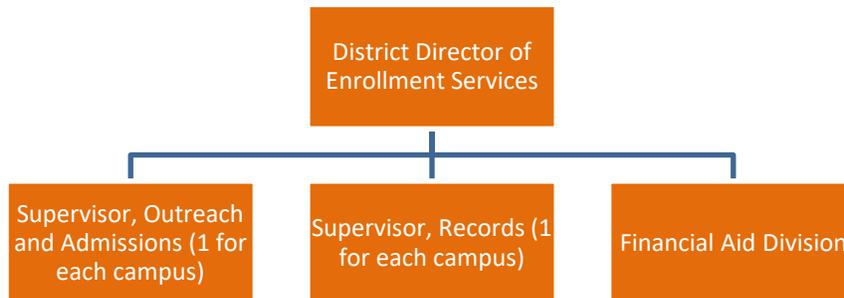
- Current staffing levels may be sufficient, but the lack of a centralized goal and mission with the unit is causing unequal workloads and a lack of consistency across the four colleges. Bringing the offices together, and focusing on function, will identify opportunities for growth and innovation.
- Accountability is key. With no one centrally leading on enrollment, there is a lack of accountability within the unit itself. The district needs to identify someone (or someone's) who have ownership of the enrollment process, data, technology, and deliverables of the unit, and ensure goals are met.

For a centralized structure, the District would need to separate out the admissions function from the current Admission/Records office and link that function to the current outreach office. This will leave Records as a stand-alone office and reorganized along functional lines; see Option 2 on page 33. Within this structure, the District should arrange reporting lines to optimize accountability and ensure efficiency: all campus based directors/supervisors of outreach/admissions, records and (in conjunction with the other consultant recommendations) financial aid could report to a single senior-level enrollment services manager at the district level. This model would ensure consistency of service across all campuses, thereby improving the entire student experience. It may be counterintuitive to the individualism of each campus, but since the offices could remain on the campuses, the individual relationships and reliance on people to best serve students may continue.



These steps, if taken, would result in the following organizational structural changes:

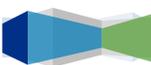
**Figure 4 – A Centralized Structure**



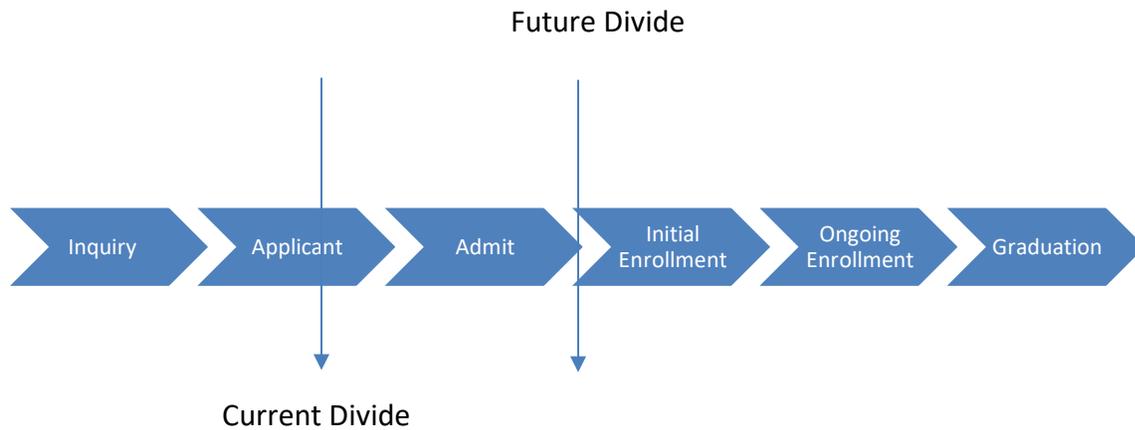
While this is an ideal state, resources and other limitations may require the District to pick and choose how to organize. As such, the District may find that the appropriate solution lies in a combination of parts from any of the options noted below and detailed in Appendix B. Regardless, LRCCD should implement a model that will, ultimately, serve students best.

### Step 1

- Splitting the current Admission and Records office into two separate offices focuses on the beginning part of the student journey. See Figure 5, which identifies the student enrollment journey and where current, and future lines, exist. To accomplish this, some staff from the current Admissions and Records offices may need to be reassigned to the outreach offices. Select processes and technologies will likely need to shift as well. A renaming of offices would also be appropriate. This movement would be further explored as part of the implementation plan (see below). See a potential organizational chart in Appendix B.

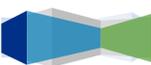


**Figure 5 – Student Enrollment Journey**



**Step 2**

- A new structural model for the Records (or Admissions and Records) office. Two options are recommended; both are obtainable, and each has its own strengths and weaknesses.
  - Option 1: Building on function, this option would be a reorganization around functionality. Rather than having transcript evaluators, for example, reporting to the local supervisor, all transcript evaluators would report to a central person. That person may be a supervisor of a campus as well. Other functions may include technology, graduation and degree audit, residency, application processing, etc. The functions would be determined based on the goals of leadership and influenced by conversations with incumbents and institutional data. This alignment along functional lines ensures consistency, promotes innovation, provides ongoing training, and develops career



advancement opportunities. See a potential organizational chart in Appendix B.

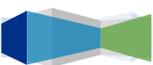
- Option 2: Enrollment offices typically have three constituencies: the student, faculty/staff, and technology. This model builds an office around these three areas, having leads in each area with assigned staff under each group. For students, this may be transfer evaluators, petitions managers, certifying officials, etc. For faculty, this may be grading and course management. For technology, it would be analysts focusing on the admission application, Peoplesoft, data and analytics. An alignment on constituency focuses attention on providing relevant services to populations in ways and on timelines that make sense for them. It allows personnel to grow collegial partnerships and tailor experiences and knowledge to enhance customer service and improve innovation. See a potential organizational chart in Appendix B.

If LRCCD wants to test centralization in terms of having staff and functions housed in a singular location, the transcript/degree evaluators would be the ideal starting point. They primarily serve a back-office function, and if OnBase is properly utilized, they can perform that function from anywhere. Having them all together may afford efficiencies in managing workloads and providing training.

## **Staffing**

For existing positions, the following is recommended:

- Specific positions are assigned to specific functions. Job descriptions should clearly indicate the scope of the function and outline the tasks leading up to, during, and after completion of the task. Levels of accountability should be included.
- Positions should fit into a clear career advancement pathway (i.e., Clerk 1 to Clerk 2 to Clerk 3, etc.)



- Staff be reallocated, or reassigned, as needed, to provide optimal deliverables and to maximize individual skills and knowledge.
- Position descriptions should be universally applied across all the campuses.
- If and when possible, positions should be articulated using common admissions/records nomenclature, including associate/assistant director, transcript evaluator, room scheduler, etc. This will help with future hiring and professional development opportunities.

Some future positions should be considered, including:

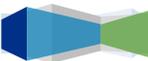
- A District wide CRM functional lead
- A District wide enrollment technology lead
- A permanent, District wide admissions/records/enrollment lead (required for a centralized model)

An assessment on staffing levels is not available at this time in light of the absence of objective metrics illustrating the volume of workload, time spent on tasks and overall processing times. Additionally, it is recognized that the number of staff assigned to a specific function, and how job duties are fulfilled will be reviewed during the implementation stage.

LRCCD may also wish to explore AACRAO's Professional Proficiencies (<https://www.aacrao.org/resources/core-competencies/professional-proficiencies>) to learn more about common language, responsibilities, skills and knowledge.

### **Implementation Plan**

Regardless of future state, the changes recommended in this report and those ultimately adapted by Los Rios will require a coordinated, tiered implementation. For this process, it is strongly recommended that a series of implementation teams be developed. These teams need to be functional, or process based, and span across all four campuses and the outreach centers.



Institutional design, buy-in and engagement, as well as feedback, will be essential to ensuring the success of this project.

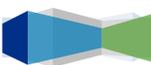
The implementation teams should be guided by leadership at LRCCD level. This group should set deliverables, be responsible for holding teams accountable, coordinating projects, and finding the resources to support the initiative.

Team leads should be subject matter experts in their assigned areas. They should be chosen for their commitment to the redesign and to meeting the goals and objectives of the project. They should have a say in their team membership. A large portion of their time should be dedicated to this project.

Team membership should be varied and inclusive. This is an opportunity to engage those who do the manual work, those who sit outside of Admissions and Records but who rely on them to complete tasks, and those who represent unique, under-represented or under-served populations. This is a great way to get faculty and students involved in the process.

Teams might include operations, technology, student records, transcript evaluation and degree audit, publications and communications, unique populations, and professional development. These topics are similar to those presented earlier in this report, and these recommendations (along with other identified deliverables) can act as a launching point for the teams. All teams should approach the issues and solutions with a student-centric and equity minded lens.

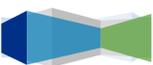
Appropriate and necessary resources need to be available for the implementation. This includes technology, data, personnel, time, professional development/training, and support. It is recommended that an allocated budget line, a temporary reassignment to the implementation team, and ongoing transparency and communications with the entire LRCCD occurs. Townhalls, coffee chats, a website or newsletter are all options for providing updates and getting feedback. When, and as appropriate, students should be part of designing solutions; as the primary constituent and focus, they need to be a part of influencing decisions and planning.



Regardless of which implementation approach is adopted, staff training and professional development will be critical throughout. This will require time for staff to learn new approaches to tasks and to fully learn tasks that they may have only partially learned to date.

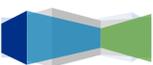
### **Timeline for Recommendations**

- ⇒ Staffing and organizational structure 3 – 6 months.
- ⇒ For current positions, 3-6 months; for future hires, in coordination with relevant projects.



## Closing and Next Steps

Thank you for the opportunity to work with Los Rios Community Colleges District on this phase of the project. It is our mission to provide subject matter expertise and to transfer knowledge so that institutions can provide outstanding transformational and transactional service to students and meet their enrollment goals. This report contains several large scale and mutually dependent changes to policy, practice and technology. It is recommended that Los Rios Community Colleges District develop a project plan for all of these changes and working groups to manage these changes. As part of phase 2 of our engagement, AACRAO Consulting will be providing ongoing subject matter expertise to help with the Admissions and Records redesign model and the development of the implementation plan.



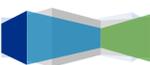
## Appendix A: Interview Schedule



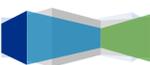
Jody Gordon, Managing Consultant  
Seth Kamen, Consultant

### Los Rios Community College District Admissions and Records Redesign All meetings held via Zoom.

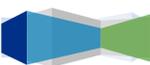
| Date/Time                            | Population                        | Attendees  |
|--------------------------------------|-----------------------------------|--|
| November 9, 2021<br>10am – 11am PST  | Admissions and Records, ARC       | <ul style="list-style-type: none"> <li>Nichole Marjanovich, Evaluator I</li> <li>Liudmila Karanchuk, Clerk 3</li> <li>Fatuma Marie Kay, Clerk 3</li> </ul>   |
| November 9, 2021<br>11am – 12pm PST  | Admissions and Records, FLC       | <ul style="list-style-type: none"> <li>Christine Wurzer, Supervisor</li> <li>Tatiana Stefango, Education Center Clerk</li> <li>Rochelle Franco, Evaluator/Degree Auditor</li> <li>Lupe Martinez, Counter Staff</li> <li>Tracy Hemmenway, Educational Center Assistant</li> <li>Kathy Guzzi, Clerk III</li> </ul>   |
| November 9, 2021<br>1pm – 2pm PST    | Admissions and Records, SCC       | <ul style="list-style-type: none"> <li>America Rust, Evaluator II</li> <li>Laura Reyes-Quillin, Clerk II</li> </ul>  |
| November 18, 2021<br>10am – 11am PST | Admissions and Records, CRC       | <ul style="list-style-type: none"> <li>Julia Villalobos, A&amp;R clerk</li> <li>Michael Kearney, Evaluator/Degree Auditor</li> <li>Denize Figueroa, Evaluator/Degree Auditor</li> </ul>  |
| November 18, 2021<br>11am – 12pm PST | LRCCD Veterans Officials          | <ul style="list-style-type: none"> <li>Christine Wurzer, Admissions &amp; Records supervisor / VA certifying official, FLC</li> <li>Denise Figueroa, Evaluator/Degree Auditor, CRC</li> <li>Blanche Levy, Evaluator II/VA Certifying Official, SCC</li> <li>Elena Skubenich, Veterans Center, Clerk III, ARC</li> <li>Terri Hunnefeld, Clerk II / VA Certifying official, ARC</li> <li>Amanda Carroll, Evaluator II/VA Certifying Official, ARC</li> </ul> |
| November 18, 2021<br>1pm – 2pm PST   | A&R Supervisor Interview (Part 1) | <ul style="list-style-type: none"> <li>Richard Andrews, supervisor, CRC</li> <li>Christine Wurzer, supervisor, FLC</li> <li>Kim Goff, supervisor, SCC</li> <li>Julie Olson, Interim Supervisor, ARC</li> </ul>   |



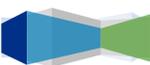
|                                     |                 |  |
|-------------------------------------|-----------------|--|
| December 3, 2021<br>12pm – 1pm PST  | Counseling, SCS | <ul style="list-style-type: none"> <li>Lakia DeCosta, Supervisor</li> <li>Nichelle Williams, Counselor</li> </ul>  |
| December 6, 2021<br>9am – 10am PST  | Faculty, SCC    | <ul style="list-style-type: none"> <li>Kelly Gould, professor and chair of criminal justice</li> <li>Craig Davis, geography professor</li> <li>Mark Boguski, chair of the art department</li> </ul>  |
| December 6, 2021<br>11am – 12pm PST | Counseling, ARC | <ul style="list-style-type: none"> <li>Annaliese Pennell, Counselor Supervisor</li> <li>Megan Bevens, Counselor and Department Chair</li> </ul>  |
| December 7, 2021<br>9am – 10am PST  | Faculty, CRC    | <ul style="list-style-type: none"> <li>Brian Noel, automotive technology management and acting as curriculum chair for the campus</li> </ul>   |
| December 7, 2021<br>10am – 11am PST | Counseling, CRC | <ul style="list-style-type: none"> <li>Ray Mapeso, General Counselor and Department Chair; PUENTE Counselor</li> <li>Eva Rhodes, Counseling Center Supervisor</li> </ul>   |
| December 7, 2021<br>1pm – 2pm PST   | Faculty, ARC    | <ul style="list-style-type: none"> <li>Carina Hoffpauir, English Department and Coordinator of Writing Center, VP Faculty Senate</li> <li>Jessica Nelson, Counselor, Co-Chair Starfish Implementation, Back on Track program, Homebase Counselor</li> <li>Kay Lo, General Counseling, Coordinator of Asian American Learning Community</li> <li>Cathy Arellano, PUENTE, Faculty in English</li> <li>Megan Bevens, Counselor and Department Chair</li> <li>Judith Valdez, ENLS Program, Coalition for Undocumented for Students and Allies</li> </ul> |
| December 8, 2021<br>10am – 11am PST | Counselor, SCC  | <ul style="list-style-type: none"> <li>Ken (KT) Times, counselor with African American Students</li> <li>Diane Belair, counselor within FYE</li> <li>Sandra Guzman, counselor with PUENTE project, and undocumented population.</li> </ul>   |
| December 9, 2021<br>1pm – 2pm PST   | Faculty, FLC    | <ul style="list-style-type: none"> <li>Jason Petro, allied health department chair, med tech program</li> </ul>  |



|                                      |                     |  |
|--------------------------------------|---------------------|--|
|                                      |                     | <ul style="list-style-type: none"> <li>• Bernadette Anayah, ESL faculty and former department chair, primarily at the outreach center, chair the matic and student success committee at FLC and the DO Diversity committee</li> <li>• Caleb Fowler, professor of CMIS, former department chair</li> <li>• Carlos Lopez, Dean of Curriculum and Assessment; department chair</li> <li>• Inna Tikhonov, department chair for Counseling</li> <li>• Debora Silva, department chair and faculty member</li> <li>• Amber Longhitano, athletics counselor</li> </ul> |
| January 24, 2022<br>10am – 11am PST  | Students            | <ul style="list-style-type: none"> <li>• FLC Student</li> </ul>  |
| January 28, 2022<br>11am – 12pm PST  | Students            | <ul style="list-style-type: none"> <li>• Warda Ali, ARC</li> <li>• Jeanette Myers, FLC, SCS, ARC</li> <li>• Kristen Ross, ARC/CRC</li> <li>• Lisa Yang, N/A</li> <li>• Josiah Colquitt, ARC/FCC/CRC</li> <li>• Joy Salo, FCC</li> <li>• Alecia Perez, FCC</li> </ul>   |
| February 7, 2022<br>1:30pm – 3pm PST | Special Populations | <ul style="list-style-type: none"> <li>• Clare Kevin, ARC</li> <li>• Julie Olson, Interim Supervisor, ARC</li> <li>• Kim Goff, A&amp;R supervisor, SCC</li> <li>• Kevin Porter, ARC, Instructional Services Assistance, Dual Enrollment</li> <li>• Tracey Hemmenway, El Dorado Center (FLC)</li> <li>• Rosana Chavez-Hernandez, Dual Enrollment, SCC</li> <li>• Mariko Peshon McGarry</li> <li>• Sarah Aldea, FLC, dual admission students</li> <li>• Natalya Lodzhansky</li> <li>• Christine Wurzer, FLC</li> </ul>   |

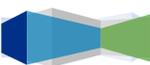
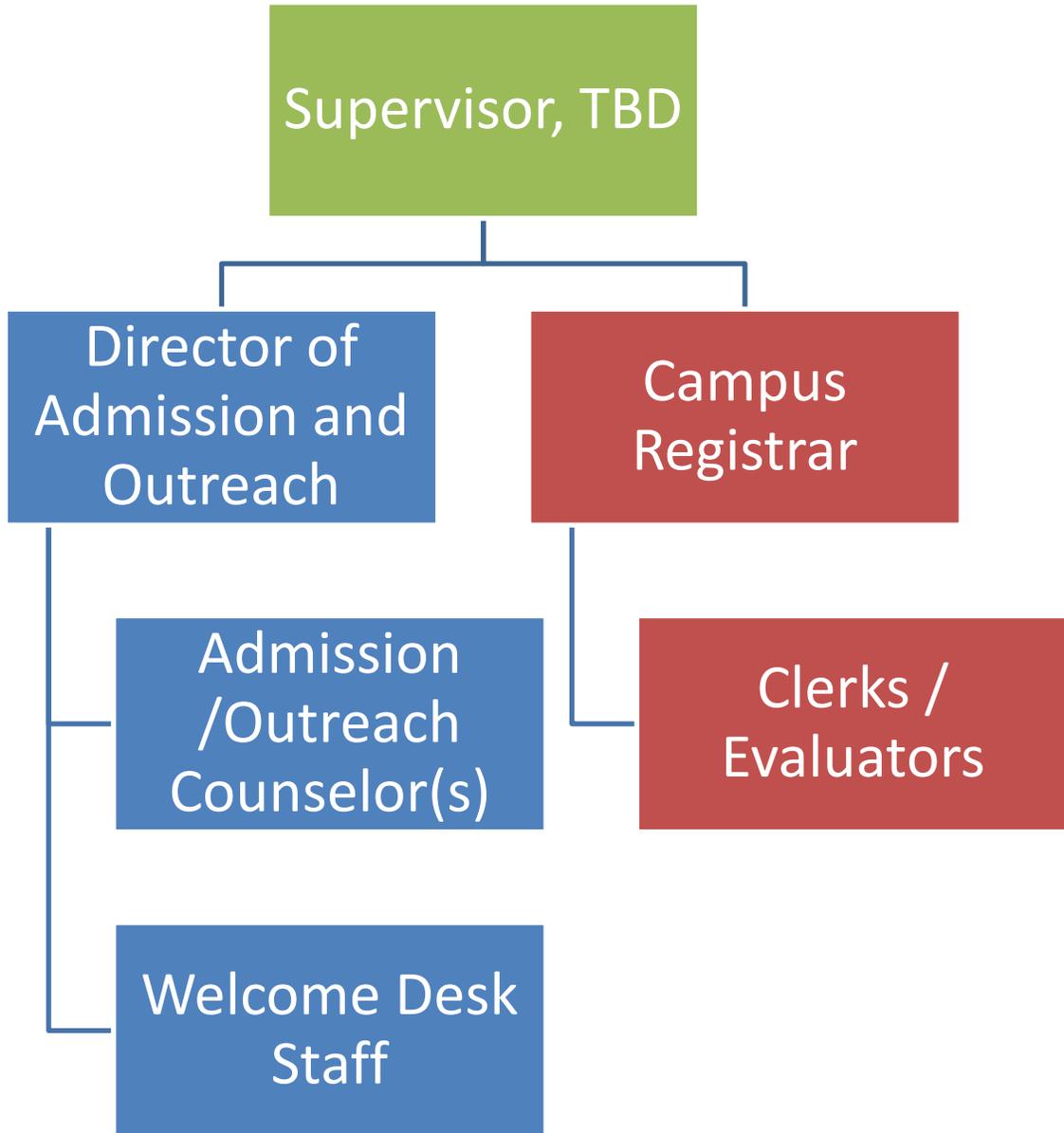


|                                     |                        |   |
|-------------------------------------|------------------------|---|
|                                     |                        | <ul style="list-style-type: none"> <li>• Traci Scott, CRC</li> <li>• Lisa Carrillo-Llamas, Nacomas Offsite Center</li> <li>• Marie Kay, Dual Enrolled Students</li> <li>• Patty Eck, Safety Training center</li> </ul>  |
| February 8, 2022<br>9am – 10am PST  | Faculty, SCC           | <ul style="list-style-type: none"> <li>• Kia Davis, DSPS</li> <li>• Diane Belair, counselor within FYE</li> <li>• Ken (KT) Times, counselor with African American Students</li> <li>• Nichelle Williams, Counselor</li> <li>• Shannon Gilley, Counselor and Articulation Coordinator</li> <li>• Leila Stone, Allied Health Advisor</li> </ul>               |
| February 9, 2022<br>10am – 11am PST | Faculty, ARC           | <ul style="list-style-type: none"> <li>• Jose Escalante, outreach specialist</li> <li>• Angela Milano, dean of arts</li> <li>• Steve Roberson, Athletics</li> <li>• Angela Fong, Counselor Evaluator I</li> <li>• Carie Alexander, Disabled Student Services</li> <li>• Judith Valdez, ENLS program, Undocumented Scholar committee, LatinX club</li> </ul> |
| February 9, 2022<br>11am – 12pm PST | Institutional Research | <ul style="list-style-type: none"> <li>• Gayle Pitman, SCC</li> <li>• Betty Glycer-Culver, District Office</li> <li>• Emelia Michels-Ratliff, FLC</li> <li>• Steven McDowell, District Office</li> <li>• BJ Snowden, ARC</li> </ul>   |
| February 9, 2022<br>1pm – 2pm PST   | Faculty, FLC           | <ul style="list-style-type: none"> <li>• Libby Cook, Program Coordinator</li> <li>• Eric Wada, Biology</li> <li>• Lishia (lie-she-a) Rahman, Adjunct Counselor</li> </ul>   |

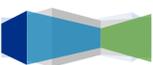
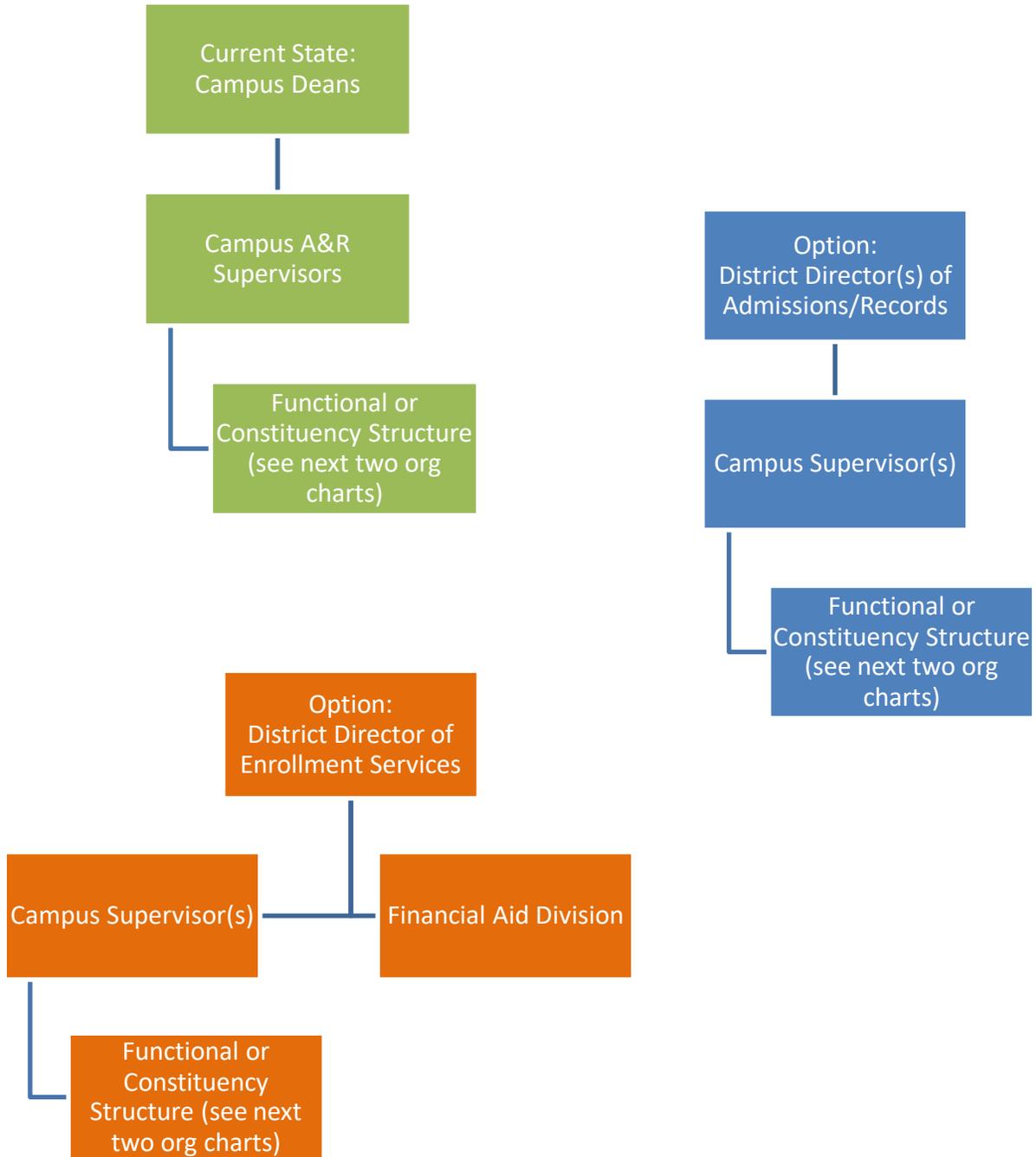


## Appendix B: Organizational Charts

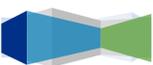
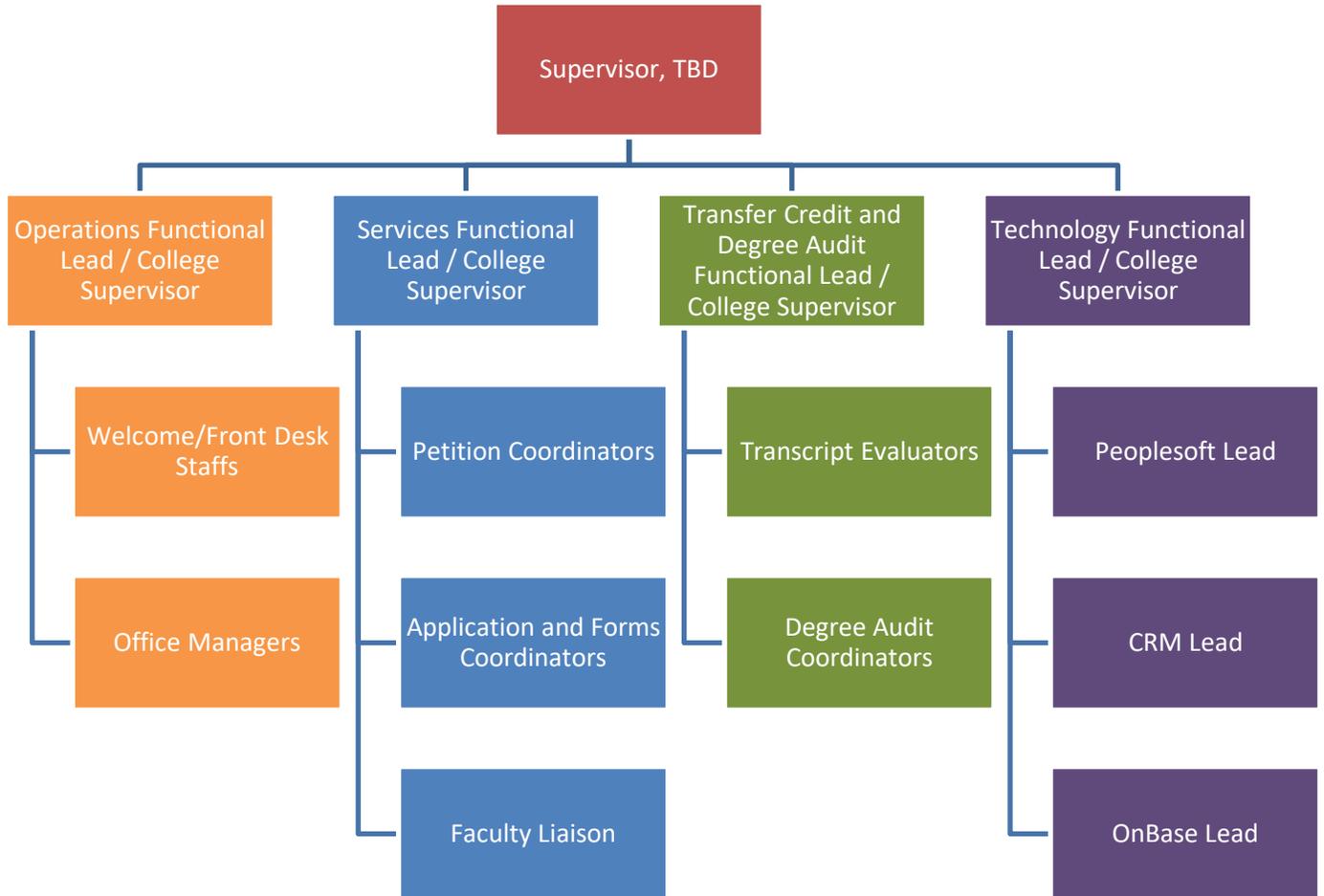
**Decision 1:** Example of splitting Admissions and Records, regardless of reporting lines:



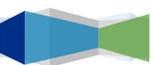
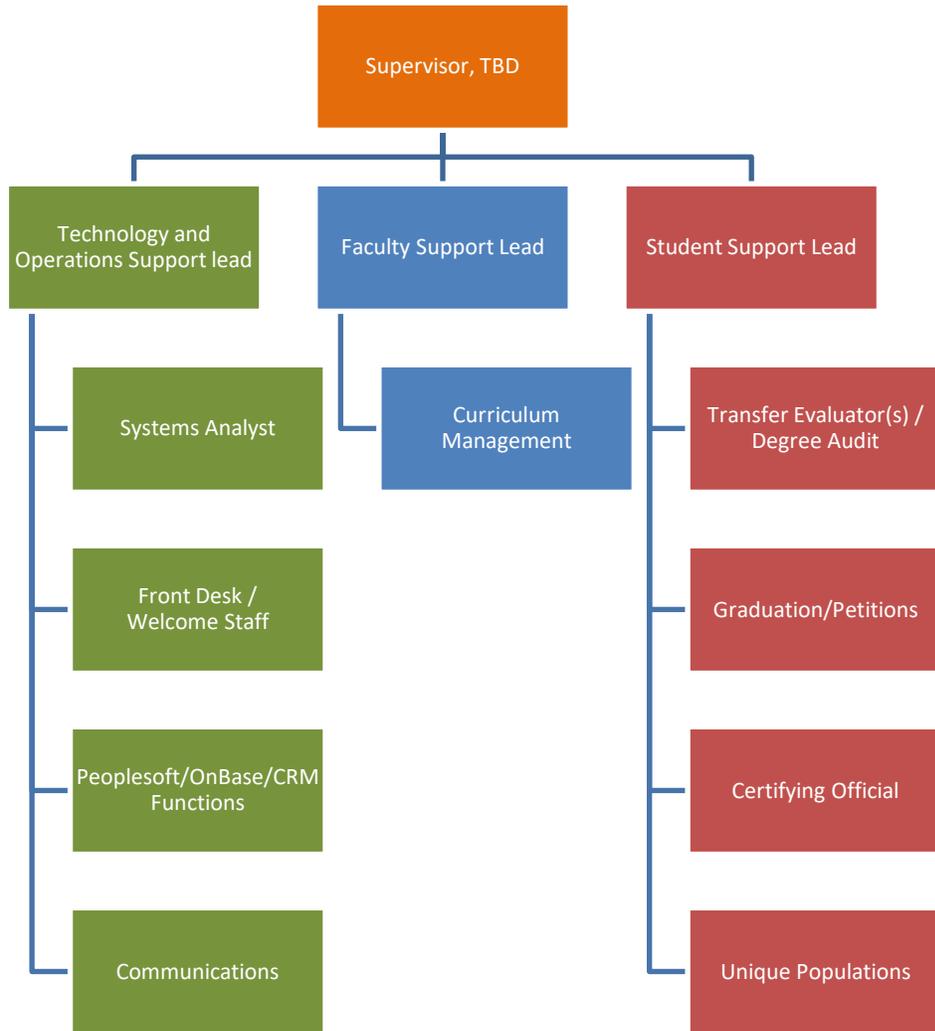
**Decision 2: Reporting Lines, Three Independent Potential Reporting Lines:**



**Option 1:** Example of Functional Model, regardless of reporting lines:



**Option 2:** Example of a Constituent Model, regardless of reporting lines:



## Appendix C: Resources

AACRAO maintains a long history as a leader in enrollment services. Included below is a list of select publications in support of implementing the recommendations in this report. A full listing of AACRAO publications can be found at:

[https://community.aacrao.org/CPBase\\_store?page=a0l1600000DTORBAA5&site=a0p16000006siHdAAI#](https://community.aacrao.org/CPBase_store?page=a0l1600000DTORBAA5&site=a0p16000006siHdAAI#)

### Admissions and Records

Lauren, B. (2008). *The College Admissions Officer's Guide*. Washington, DC: AACRAO.

[https://community.aacrao.org/CPBase\\_item?id=a1H1L00000BjYRTUA3](https://community.aacrao.org/CPBase_item?id=a1H1L00000BjYRTUA3)

Sedlacek, W., & Sandlin, M. (2015). *Employing noncognitive variables to improve admissions and increase student retention*. Washington, DC: AACRAO Consulting.

<http://williamsedlacek.info/files/ACS%20Noncognitive-Jan-2013.pdf>

*The College Admissions Officer's Guide*

[https://community.aacrao.org/CPBase\\_item?id=a1H1L00000BjYRTUA3](https://community.aacrao.org/CPBase_item?id=a1H1L00000BjYRTUA3)

*Recruiting and Retaining a Diverse Student Body*

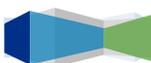
<http://www4.aacrao.org/publications/catalog.php?item=0152#.WyPj1VVKiUk>

*The Registrar's Guide: Evolving Best Practices in Records and Registration*

[https://community.aacrao.org/CPBase\\_item?id=a1H1L00000BjYRJUA3](https://community.aacrao.org/CPBase_item?id=a1H1L00000BjYRJUA3)

AACRAO (2019). *AACRAO's Student Records Management: Retention, Disposal, and Archive of Student Records*. Washington, DC: AACRAO.

<http://www4.aacrao.org/publications/catalog.php?item=0138#.WQei2IWcErE>



## Admissions – Transfer

Shapiro & Associates (2015). *The transfer handbook: Promoting student success*. Washington, DC: AACRAO. [https://community.aacrao.org/CPBase\\_item?id=a1H1L00000BjRmvUAF](https://community.aacrao.org/CPBase_item?id=a1H1L00000BjRmvUAF)

*A Guide to Best Practices: Awarding Transfer and Prior Learning Credit.*

[https://www.aacrao.org/docs/default-source/signature-initiative-docs/trending-topic-docs/transfer/guide-to-best-practices.pdf?sfvrsn=4820bb55\\_6](https://www.aacrao.org/docs/default-source/signature-initiative-docs/trending-topic-docs/transfer/guide-to-best-practices.pdf?sfvrsn=4820bb55_6)

## Holistic Student Support

National Association of Student Personnel Administrators (NASPA),

<https://www.naspa.org/home>

## Professional Development

American Association of Collegiate Registrars and Admissions Officers (AACRAO),

<http://www.aacrao.org/>

Emerging Concerns, New Techniques, and Technology in Higher Education:

College and University Journal, <https://www.aacrao.org/research-publications/quarterly-journals/college-university-journal>

Online courses (such as *Admissions Counselor Recruiter*, *Managing the Admissions Office*, *Registrar 101 and 201*), <https://www.aacrao.org/events-training/online-learning>

