

Enrollment Management COVID-19 Update

FTIAC OUTREACH via REMOTE OPPORTUNITIES:

- With all in-person visits being canceled, we have created a [virtual visit page](#) that is currently live on the EMU website and being marketed to prospective and admitted students. The page includes:
 - Our virtual tour video, as well as a new flyover campus video
 - Link for students to schedule virtual admissions appointments with our admissions advisors
 - Link to a page called "Meet the Tour Guides" which includes photos, profiles, and quotes on our student tour guides, with the option for students to "request a chat" with one of them or join a daily live chat
 - Page listing live virtual recruitment events, including admissions presentations, college fairs, and admitted student events
- Constant Motion Productions has finished an "Ask Me Anything" video that focuses on our student tour guides and answering frequently asked questions. Will be rolled out soon.
- Worked closely with IT to enable Cisco soft phones on FTIAC, Transfer, and Graduate teams' computers. This allows advisors and staff to connect their computers to their office phones, and make incoming or outgoing calls
- Working closely with the advising and orientation teams and continuing to communicate with students for upcoming Fast Track dates to encourage them to schedule phone appointments with academic advisor to sign up for classes
- Promoting our online Fast Track Canvas course that the orientation teams developed so admitted students can take instead of attending an in person Fast Track.
- Our search campaign has launched on time with updated visit language and includes appropriate messaging to the juniors and sophomores in our funnel
- Developed Test Optional policies for Fall 2020 FTIAC applicants
- We signed up for a mobile admit packet to complement our print packet a few months ago. We are now working to get it up and running
 - Using this same technology, we are developing a virtual graduation experience for our applicant pool.
- Non-traditional admit letters have been redesigned by Pryor Design and moved to University Litho for printing instead of in-house printing
- Working on publication redesign for next year with Pryor Design starting with the undergraduate and graduate viewbooks
 - Print materials will include push students to online resources, such as videos

TRANSFER:

- Developed a Summer landing page to include information on Guest Application, the EMU CARES Grant and link to the course catalog.
- Developed a communication campaign to contact previous years' applicants and encourage them to become a Guest Student in the Summer and push to transfer to EMU come Fall
- All pro staff and GAs are now set up to work from home and are able to take advisor appointments virtually
- We will be utilizing student workers to make outgoing calls for Transfer Admissions

- Virtual Visit page is being created for the Transfer population to take the place the Transfer Open House
- Executing communication plan for promoting Summer and/or Fall 2020 courses
 - Developing a communication plan for pool of 46,000 previously admitted students within a 40-mile radius from the last 2 years that chose to attend other institutions to encourage them to reconsider their choice and transfer to EMU as commuters
- Working on an internal policy to conditionally admitted students with unofficial transcripts as it becomes increasingly difficult to receive transcripts from other institutions

INTERNATIONAL

- Working with a vendor to create webinars for international students and scheduling professors to join to answer questions
- All agents, partners, Fulbright advisors, and high school counselors have been updated on EMU's response to COVID-19 and encouraged applications for Fall 2020 semester to continue. They are aware that we still keep processing applications, with a little delay.
- Both TOEFL and IELTS have announced that they will provide online test sessions for some students in some areas. More details will be provided by the end of March.
 - Updated our policies to allow DuoLingo as a test option for Fall 2020 applicants only

PROCESSING

- Working to create a process for one of the team to pick up mail and being able to scan documents that are retrieved
- All processors are set up now to work from home, one person is getting set up with a hot spot from IT as she doesn't have internet at home

GRADUATE

- Applications are being processed
- With Graduate Open House canceled, our team is reaching out to all of those that registered and Graduate Coordinators have also been asked to reach out to those interested in their programs
- The Writing Center remains a resource for students
- The enrollment management team is working with department coordinators to help with overflow with email and/or appointments by phone, email, video conferencing
- GA doing a follow-up courtesy call to GOH lead generated list (117)
- We are working with our vendor to develop a landing page for graduate admissions/open house scholarship opportunity (2 scholarships \$1,000 each)

FINANCIAL AID

- All staff and financial aid advisors are working and handling any issues remotely
- Hosting Financial Aid webinars in May to help answer any questions students might have during this time. These are marketed as a PSA and are available to the public.
- Working on current student packages
- 2 staff going in periodically to handle things that need to be done in person, including checking the mail for scholarship checks

- Working with SBS to come up with a plan to be able to take checks remotely
- We are preparing our staff for an influx of financial aid appeals due to students and their families that may lose income sources because of COVID-19

CURRENT EMU STUDENTS

- Working with a list of enrolled students for Winter 20, we are developing a communication plan to promote summer school enrollment which will include emails from Deans or other faculty, automated voice messages, and texts

Report of the University Budget Council Subcommittee on Staffing

Objective: *Develop methodology for analysis of data that will enable evaluation of the need for staffing of all units across the university.*

- I. **Clerical Staffing:** The table below shows the separations from the university, replacements, and net loss of a number of positions following the VERIP (as of January 25, 2020).

The substantial net loss of staff due to VERIP this year has generated particular concern in this subcommittee over an apparent gap in clerical assistance in academic units, which is traditionally thought to be primarily provided by the Clerical Secretary (CS) who is physically located in the department, school, or other unit that they support.

Eclass	Separations	Replacements	Net loss
Clerical Secretary (CS)	24	5	19
Administrative Professional (AP)	21	4	17
Professional Technical (PT)	28	10	18
Food Service and Maintenance (FM)	11	5	6
Faculty (FA)	15	0	15
Faculty (FA) – Voluntary Phased Retirement	27	0	27
Full-Time Lecturer (FTL or LE)	10	0	10
Campus Police (CP)	2	0	2
Athletic Coach (AC)	1	1	0
Confidential Administrator (CA)	3	0	3
Total	142	25	117

Inspection of more detailed data on CS assignments in departments and schools for the five SCH-generating colleges provided by the University Budget office reveals that CHHS, which produced 52,233 SCH in FY19, has no secretaries, and all other College Dean's offices have one CS; COE'S Associate Dean also has one CS. The FTE CS in the other colleges is shown in the table below along with the number of Student Credit

Hours (SCH) generated by the academic units in FY19. All but one unit generating greater than

SCH	Number of departments or schools at each level of CS support in CAS/CET/COB/COE*						Total
	0 FTE	0.5 FTE	0.6 FTE	0.8 FTE	0.9 FTE	1.0 FTE	
greater than 10,000	0	1	0	0	0	13	14
5,000 to 10,000	2	2	0	2	1	4	11
less than 5,000	3	0	1	0	0	1	5

*Data initially provided by University Budget Office were updated to reflect changes in CAS that occurred later in FY20.

10,000 SCH in FY19 have one full-time CS. Four of 11 units producing between 5,000 and 10,000 SCH have one full-time CS, with varying levels of CS FTE support for the other units including two that have no CS. Finally, only one of the five units that produced less than 5,000 SCH has a full-time CS with three of the remaining four units having no CS. Taking a deeper dive into IRIM data reveals that there are a number of CS and PT positions in the colleges not assigned to a department or school. This suggests that units may be centrally supported, that is, in the Dean's office, but this will need to be confirmed. If so, it remains to be evaluated whether there is smooth functioning of the unit without a negative impact on the workload of faculty, or administrative professionals (department heads and school directors). It will also need to be determined whether one CS or PT is sufficient given a greater degree of complexity of programming in some departments or schools.

Conclusion: *EMU student, faculty, and administrative evaluation of services should be conducted across all academic units to determine if there is sufficient support of their needs by clerical staff and student employees.*

- II. **Instructional Staffing:** Comparative analysis of academic institutions serves as a framework for evaluating the status of instructional staffing at EMU. Analysis of the number of and budget for faculty, full-time lecturers, and part-time lecturers as well as the non-instructional staff at EMU over time contributes to an understanding of the institutional commitment to instruction and its support.

The Hanover Study. A study completed in February 2018 by the Hanover Group compared 2015-2016 data for EMU, which at the time generated 503,000 SCH, with 12 other institutions that generate around 400,000 Student Credit Hours. Analysis of these data suggests that EMU may be approaching or exceeding staffing rates of our peers in 'management', 'instruction', and 'community service, legal, arts, and media'. More analysis is needed to understand how individuals are categorized and counted in this study. It also seems that there is wide variation across the universities in the study in terms of mission and programs offered, which may limit the usefulness of comparisons on these metrics.

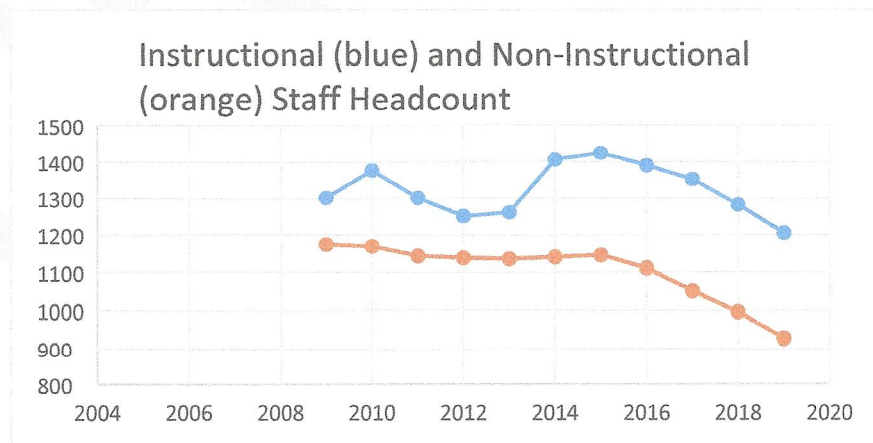
Comparison of Michigan Comprehensives. The committee also analyzed 2019 data from several regional comprehensive institutions within the state of Michigan, principally to look at instructional staffing as they relate to the amount of student credit hours (SCH) generated. The graphs on page 4 show the relationship between the number of Faculty, Faculty+Full-time lecturers, or Faculty+Full-time lecturers+Part-time lecturers and the number of SCH. EMU sits above the trend-line for the Faculty Headcount graph, indicating a slightly higher number of faculty/SCH than the average school in the state. The EMU Faculty+FTL Headcount/SCH more closely aligns with other Michigan regional comprehensives; the relatively high correlation ($R^2 = 0.930$) between Faculty+FTL and SCH among Michigan schools is noteworthy. Interestingly, when the PTL Headcount (Winter '19) is added to the sum of the number of Faculty and FTL headcount, the total headcount is considerably above the trend-line as shown on page 4, indicating that the number of PTL lecturers/SCH is substantially greater than the average Michigan institution.

EMU Instructional and Non-instructional Staffing over Time.

As shown in the graph to the right, the relative number of instructional staff has varied from 2009 through 2014, largely due to the considerable fluctuation in the number of part-time lecturers over this period, while the non-instructional staff had only a slight decrease.

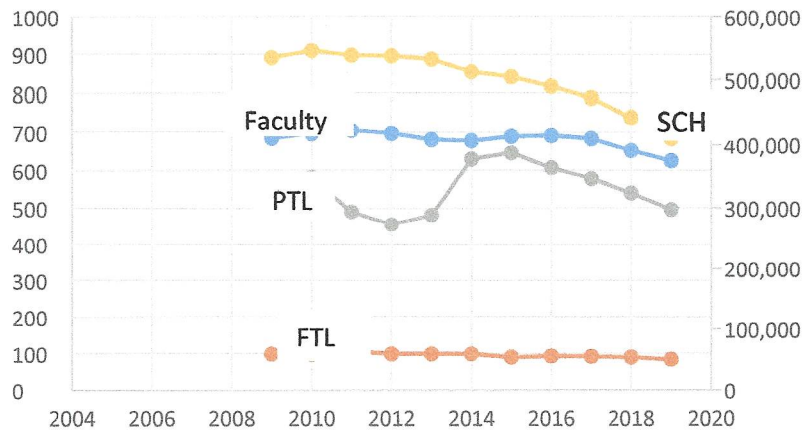
However, from 2015 through 2019, the

reduction in the number of instructional staff has paralleled the reduction in non-instructional staff.



The graph at the top of page 3 shows that there has been about a 10% reduction in the number of FTL over the last 10 years, a fairly constant number of faculty up until a decline over the last few years, and a varying level of PTLs before a decline that parallels the reduction in SCH over the last five years.

10-year change in Instructional Staff Headcount and SCH



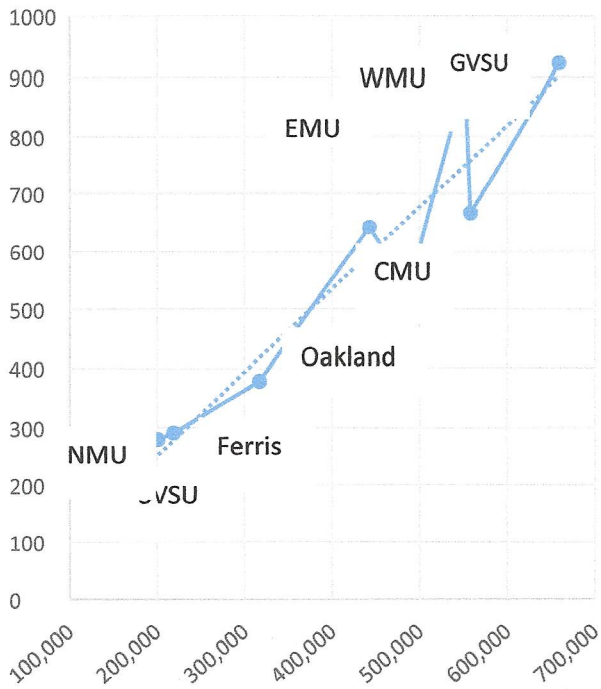
The table below of IRIM data displays a summary of six fiscal years of academic budgets. The instruction-related budget rose from \$78M in FY14 and FY15 to a high of \$79M in FY17, but since has declined to a six-year low of \$76M. The instruction-related budget as a % of the total expended academic budget decreased from 49.9% in FY14 to 48.4% in FY19. The marked decline in SCH over the last six years

with a relatively constant expended academic budget has resulted in a 20% increase in the cost per SCH from FY14 to FY19.

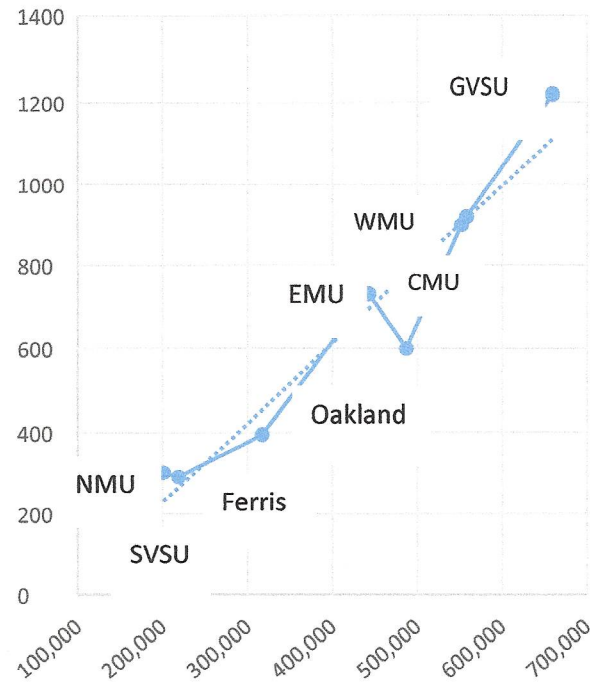
Academic Budget (excludes EPEO & Enrollment Management; General fund budget data are subjected to change. Instruction-Related Budget only includes 10XX and 11XX accounts)								
	FY14	FY15	FY16	FY17	FY18	FY19	1-Yr. Δ%, FY19 - FY18	5-Yr. Δ%, FY19- FY14
Total Expended Academic Budget	\$157,036,551	\$157,064,640	\$161,294,036	\$164,717,741	\$161,613,579	\$157,133,565	-2.8%	0.1%
Cost per SCH	\$295	\$306	\$319	\$336	\$342	\$354	3.5%	20.0%
Instruction-related Budget	\$78,326,360	\$78,074,057	\$78,983,564	\$79,271,458	\$77,441,691	\$76,094,674	-1.7%	-2.8%
Research	\$2,093,276	\$1,340,639	\$2,063,808	\$1,838,583	\$2,052,977	\$1,877,136	-8.6%	-10.3%
Public Service	\$5,443,616	\$5,182,359	\$5,574,729	\$4,861,212	\$4,302,736	\$3,853,567	-10.4%	-29.2%
Instruction-related Budget, % of Total Budget	49.9	49.7	49.0	48.1	47.9	48.4		

Conclusion: There has been considerable paring down of the instructional and non-instructional staffing over the last few years in the face of declining SCH; but EMU will have to continue to address a continuing decline in SCH.

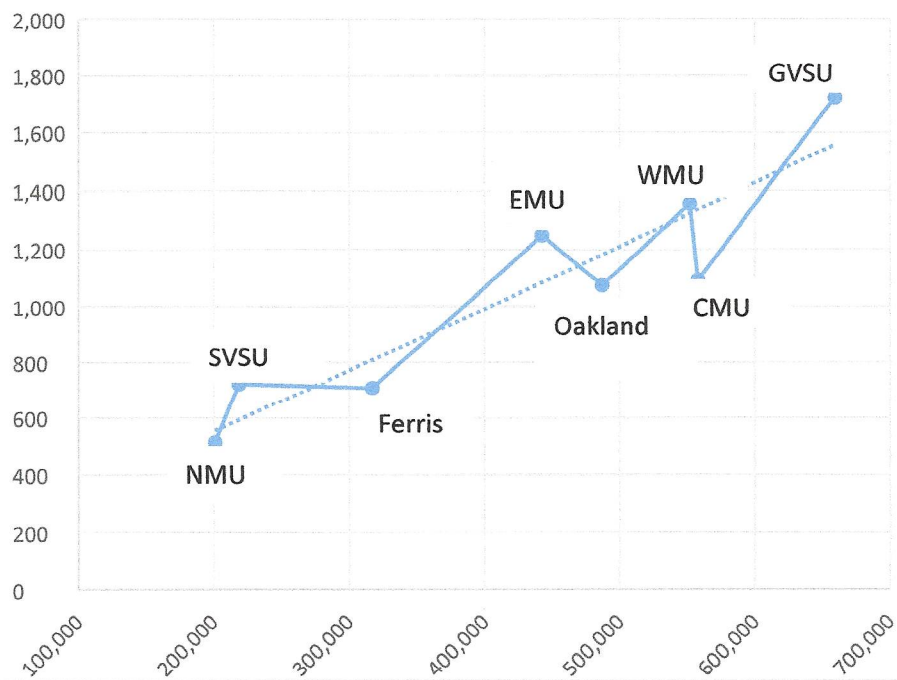
FY19 Faculty Headcount vs. SCH



FY19 Fac+FTL Headcount vs. SCH



FY19 Fac+FTL+PTL vs. SCH



Other things that would be good to evaluate?

- Curious to know: (1) How many courses/PTL for us and others; (2) Is pay comparable across institutions; (3)
- Change in PTL teaching online instruction: How many are online now?

Initial Draft from the UBC Subcommittee on Housing

We are in a very unique time in the history of our country and our university. We wrote these recommendations from our respective homes and we “hung out” to refine them for the University Budget Committee (UBC). Our campus is empty, with no in-person classes and almost all of our students go from campus housing. We need a letter explaining our presence and are subjected to thermometer readings to ensure we’re not infectious to enter campus buildings. Yes, a very unique time indeed. Despite the current state of affairs we wanted to ensure our work this year is accounted for and that we move the issue of how to proceed with campus housing forward as best we can. We have provided a number of documents that were not available last year when the issue of campus housing arose within the UBC to share with the committee. We found these documents helpful in our deliberation (see list below). When puzzling through campus housing it is important to note that campus housing is not the same as off-campus housing and these differences should be considered. There are federal and state laws and dictates that apply to campus housing that are not applied to off-campus housing. For example, the Michigan Governor’s executive order required students living on campuses across the state to return to their home of origin. EMU students not living on campus were not required to do the same.

Observations from the materials provided to UBC:

1. From the Housing Revenues and Expenses_FY12 to FY20 (see, [Housing Revenues and Expenses_FY12 to FY20.xlsx](#)), net revenue from Campus Housing is consistently between \$3.5-4.5 million per year. Accounting changes related to custodial and debt portions appear to shift over the past couple of years and lead to some facilities (e.g., West Forest) to be unable to run on a net revenue basis. The dorms raise more net revenue than the apartments.
2. From the Housing Occupancy_FY02 to FY20 (see, [Housing Occupancy_FY02 to FY20.xlsx](#)), EMU’s housing capacity is typically higher than occupancy. The current capacity is just over 4,200 beds and there are just under 3,200 beds used. The number of students in campus housing has declined and further analysis is needed to determine whether the decline in housing occupancy follows the overall trend line of credit hour decline. The average occupancy of 3,500 beds suggests that there is currently an oversupply of campus housing for the student need. Perhaps reconsidering how we utilize campus housing space (e.g., instructional spaces, short-term stay locales, campus housing for other area colleges and universities, etc.) might close the gap between capacity and

utilization, and could serve as an alternative revenue source to support housing facilities renovations.

3. From the Housing_Capital Expenditures_50 Years (see, [Housing_Capital Expenditures_50 Years.xlsx](#)), the total capital cost for maintaining and updating the current housing facilities over the next 50 is just over \$225 million. It is unclear what the timeline is for each facility's cost and whether the University would like to maintain the entire housing stock. Understanding what capital expenses are urgent (next five years), and which are longer-term would help contextualize the amount needed in the short-term to address a long-term issue. This would be an important aspect of any strategic plan described in recommendation two below.

Recommendations:

1. We recommend that **no decision on-campus housing** should be made for a **year or two** until we better understand how the current pandemic affects our student numbers and the number of students living in campus housing. If the Spanish Flu of 1918 is any indicator, we will not likely return to "normal" until a vaccine is developed in a year or so.
2. We recommend using the next year or two to **deeply explore** the issue of campus housing to make an **informed and strategic decision** on the future of campus housing at EMU. This moment should be seen as an opportunity to understand best practices in campus housing and examine the interests and needs of our campus community. Creating flexible use spaces that can modulate service both short and long-term needs of the University.

UBC Budget Carryover Subcommittee End of Year Report

Members: Mohammad Aggour (Student Government), Dorothy McAllen (CET), Stephanie Newell (COB), Mike Saylor (COE), Tom Waltz (CAS)

Summary of FY 2019-2020 activities:

- The committee recommends that EMU include budget carryover as part of routine management of university finances.
- Opportunities for using carryover outside of the colleges were not explored this year.
- On the academic side of the house, it was proposed that carryover may most meaningfully occur at the college level to address within unit variability in revenue over expenses and so that carryover could be sizable enough to support strategic investment.
- The committee discussed how carryover should reflect a unit's revenue over expenses (minus a multiplier for university-level costs beyond the unit). Many details were explored, but there was insufficient time to do any modeling of any particular algorithm to evaluate the impact it would have on colleges and university finances in general. We recommend that the committee continue in FY 2020-2021 to do this modeling before a formal algorithm is determined.
- A draft proposal for the carryover process for colleges is attached.

Draft proposal for managing annual budget revenues-over-expenses

Revenues-over-expense generated by a College

1. The calculation of revenues-over-expenses is done after June 30 and the close of the fiscal year
2. Revenues-over-expenses is calculated for each college's consolidated budget, not for the separate departmental or office budgets.
 - a. Supports should be provided within college units to facilitate management of revenues-over-expenses contributors at local management levels (e.g., efficient management of instructional offerings).
3. Process for calculating and saving annual revenues-over-expenses is:
 - a. Subtract total g-fund dollars spent by a college in the fiscal year from the total dollars generated by that college in the fiscal year
 - i. A reasonable estimation of the **total g-fund dollars spent** is available a month after the close of the fiscal year (by July 31). There may be some small changes after this date, but they would be ignored for this calculation.
 - ii. A reasonable estimation of the **total funds generated**
 1. First find the total SCH earned by the college during the past fiscal year. This is available a month after the close of the fiscal year (by July 31). There may be some small changes in total SCH earned after July 31, but these would be ignored for this calculation.
 - a. SCH amounts are taken from the BOE reports for that fiscal year (summer B, fall, winter, and summer A) opening the *Section Enrollment VOD* for each semester as of July 31 and by using the total college SCH generated.
 - b. The SCH earned in summer B and summer A is manually extracted using the standard EMU rules for attributing SCH for the two summer sessions. *[this could be spelled out in detail if required]* [sections that start in one fiscal year April, May or June regardless of when they end are attributed to the summer A of that year. Courses that start July and August are attributed to summer B of the next fiscal year]
 2. The total SCH generated by the College would then be multiplied by the college budget multiplier as it was set at the beginning of the budgeting period. This multiplier is generated by the Provost's

Office and reported to the Dean's and others in August or September of each fiscal year.

- b. If in the just completed fiscal year, there are revenues over expenses then a percentage of that would be set aside for use by the College in one or both of these ways described above and as pre-determined by the College with approval of the Provost's Office. The percentage value used for carryover each year could be anchored to the overall financial health of the university (i.e., higher percentages when specific financial health indicators are met). A minimum of retaining 15% of revenues over expenses is suggested until a formula anchored to indices of the overall financial health of the university is developed. Modeling of the formula is needed to ensure that carryover incentivizes good fiscal management at the college level without restricting funding for elements beyond the college that maintain our values as a comprehensive university.

4. Where would the funds be deposited (transferred to)?

- a. The funds would go into one or more ear-marked D or R accounts (general savings or capital replacement or both) for the college to be used in the ways agreed upon when the funds are first set up (or the agreed upon ways as mutually agreed to in later years)
- b. Any college have one or both of these accounts would develop an internal process for how the funds are allocated and spent with input from all departments and offices in the college. This plan will be shared with the Provost prior to the first reallocation of revenues-over-expenses.
- c. The funds placed in these accounts are held harmless and cannot be swept at some future date without mutual agreement of the College and the Finance Office and/or Provost.

5. This process would be used starting in FY 2020-2021.

Illustrative Example:

College X revenues-over-expenses during fiscal year Y

- 1. Total g-fund spent in fiscal year Y: \$11,845,678
- 2. Total SCH earn in fiscal year Y: 40,000
- 3. College X multiplier: \$300
- 4. Total revenues earned: $40,000 \text{ SCH} * \$300 = \$12,000,000$
- 5. Revenues over expenses for fiscal year Y: \$154,322
- 6. 15% of total revenues over expenses for fiscal year Y: \$23148
- 7. College X chooses to put 30% into a general saving account: \$6,944
chooses to put 70% into a capital replacement account: \$16,204