

Intake and Onboarding Workgroup Recommendations as of May 3, 2019

A thorough review and re-envisioning of our Intake and Onboarding Processes was necessary as we aim to better support students Getting on the Path and Staying on the Path. As we aim to be a student-ready college, having intake structures in place that allow us to serve our diverse student population from the multitude of entry points is one of our biggest opportunities to improve student success as a college. For this process we considered that intake and onboarding started with a first contact between the college and prospective student, and continued through CF100 and scheduling for second semester.

We began by mapping our existing process, both the student experience and the college processes behind the scenes as a workgroup and then had students review it. We then identified questions about and opportunities for improvement in our current system, and researched best practices at other AACC Guided Pathways and ATD colleges. In our research we had the unique opportunity to learn in great detail about the incredible work done each day by the staff in our enrollment offices. Our recommendations are not a reflection of existing deficiencies but rather an opportunity to build on the great work currently being done. In looking at the system as a whole through the lens of Guided Pathways we are proposing a structure that works better for students and hopefully staff as well.

Our goal was to propose an intake and onboarding process that:

- Provides the student with a single point of contact to help them navigate this process and serve as a resource throughout their entire time at MVCC
- Is a smooth, seamless, and transparent process for students
- Can be completed quickly while also ensuring each student gets the support they need and a quality experience
- Provides more help in making informed career decisions earlier in the process
- All communication is written for students and not for staff, both in content and delivery method
- Has just-in-time and proactive communication from the college that anticipates student needs
- Focuses on being excited the students are enrolling at the college and in their program rather than just on enrollment steps

For the purposes of clarity we use the term advisor to mean a professional advisor that is combining the role of the college advisors and completion coaches and is the single point of contact. The term mentor refers to what are currently faculty advisors.

The proposed newly envisioned advisor role begins working with students during intake but is a transformational approach to providing continuity and consistency in the student experience as they stay connected to that student through graduation. Below you will find the intake and onboarding recommendations including many items about this position, and then will find an additional set of recommendations just for this new position as it spans beyond intake.

Here are the major steps to the enrollment process and the proposed updates. More detailed recommendations can be found on the following pages.

Current Enrollment Process	Proposed Updates/Changes/Additions
Student learns about MVCC through high school visits, Open House, college fairs, advertising, and more	An engaging and informative website, focused not just on value but also on the return on investment (what jobs they can get with salary and job growth information) Additional focus on outreach & recruitment of non-traditional students in the Oneida County area
Student applies	Advisors reach out to students to welcome them to MVCC and start guiding them through their next steps, working with admissions to ensure required documents and steps are completed
Student applies for financial aid	Communication demonstrates an understanding of where the student is in their enrollment process (ex: if they complete the fafsa before applying we reach out to them or if they have already been accepted when they complete fafsa the advisor is helping them complete required paperwork) & provides all information about finances and billing in one spot for families
Student is accepted	
Student takes placement tests	Advisors have explained what tests they need, why they take the test, and provided study materials in advance
Student takes the advisement survey which includes taking a career assessment in Career Coach & is scheduled for a GPS appointment to get their class schedule	There is one intake survey in Starfish, combining the reservation form, advising survey & others Students participate in a small group orientation, either online or in-person, and then an individual appointment with an advisor
Students are sent Clifton Strengths Codes	Codes will be sent by advisors after the first day of classes
Students complete final enrollment steps including submitting certificates of residency, completing additional financial aid forms, confirming their charges, buying books, etc.	Their advisor will help them complete final processes reminding them at the right time, minimizing forms and student action when possible (ex: can we take an answer for something over the phone rather than making them complete an online form), and anticipating their needs (ex: needing extended credit in the bookstore based on their program)
Students attend Convocation	Focus on students meeting with their school and faculty mentors, some fun and some practical activities like finding your classrooms and having IT help you with your access to accounts
Most students take CF100	CF100 has more career planning & development content (aimed at helping students make more informed career decisions earlier), helps students understand and utilize their strengths results (with the help of the SQ Student

	Ambassador Team), connects them to college resources, and helps them the understand how to best utilize their mentor & advisor
Students register for the next semester	Students meet with faculty mentor about 3-4 weeks into the semester Students have a hold on their account that prevents them changing their schedules without understanding the financial and academic implications Advisors & mentors work together to support students and get them registered for the next semester

Here are the many specific recommendations we have after researching best practices at other institutions. Some of these are tasks that can be more easily completed right away and some will require more exploration and research by a smaller group of staff that are specifically involved in this work. We did consider the feasibility in terms of budget, staffing, and other resources of these recommendations but recognize there are additional steps needed to determine exactly how these will happen. For example, we recommend that transcript evaluations should be available before students apply to the college but the specifics of how that will work will need to be worked out during implementation.

Website

1. Video for each major – what you will learn, what jobs you qualify for, & what makes MVCC great (see Stanley CC in NC)
2. Present non-credit and credit programs together on the website for students by career cluster/school so they can see all options in related fields – school and then all programs, separating out non-credit, credit-earning career programs, & credit-earning transfer programs
3. Credit evaluation & credit for prior learning information on the admissions page
4. Initial page for each academic program isn't course map but rather career information, **transfer articulation agreements**, basics about the program (degree type, number of credits, can it be done online/evenings/Rome, etc.), drop down menu or links for courses and transfer opportunities
5. Tuition & fees are advertised up front in a simple way, the current chart with all of the detailed information at once can be available after this but not the first thing
6. Advisor (single point of contact) is listed on the school homepage with their picture and contact information
7. You can reach Career Coach from every academic page (program page links to program page in CC) with the button labeled “Explore Careers”
8. Dual admissions listed as an option in the application but not explained on the website, so create a page and link to it from the application
9. A student-facing Starfish page (like SUNY Broome)

Admissions Office Processes

1. All contact cards (that students submit to admissions at events) are processed in 3-5 days with a follow-up message going back out to the prospective students
2. Transcript evaluations can be requested/done before the application (as it might help a student to decide to enroll), even if it is with unofficial transcripts – if it is done before application an admissions counselor communicates the information to the prospective student
3. Continue to apply new student holds at acceptance to prevent students from making changes to their schedule on their own
4. Form online or links to school forms (for our most common feeder institutions) to aid in students requesting their transcripts

5. The college develops a smoother process (through relationships with the schools) for students who are not recent high school graduates to get their transcripts (ex: Proctor charges and it's a bit of a hassle for students who graduated even 3-4 years ago)
6. Remove the tag of regular vs at risk vs advanced admit that is viewable to faculty and students in SIRS & DegreeWorks as it is confusing and discouraging
7. Students that aren't accepted/aren't eligible to all selective programs automatically have an advisor appt to talk through options (other healthcare programs, other career options, etc.) – appointment is scheduled with the advisor reaching out to the student
8. Preserve the existing relationships with high school counselors as advisors and admissions counselors work together to get applied students accepted and enrolled (ex: 15 advisors don't need to reach out to the New Hartford high school staff to solicit transcripts)
9. Host accepted student events at the college to allow students to sit in classes, see facilities, and meet faculty/staff, possibly for affinity groups and schools

Modifications to the Application

1. Brand it with MVCC logo instead of the Ellucian logo – ALREADY DONE!
2. The admissions application is for CCED career training programs (there's a note about how they aren't eligible for financial aid) & rematriculation (so they can start online) in addition to credit programs so that it is one starting point for all students even though behind the scenes it is routed to different offices
3. Links on the application page for selecting a major has link to the schools, Career Coach, and the opportunity to schedule a career counseling appointment instead of continuing into the application
4. On the application the majors are listed in common language, indicate degree type, and if it is a Rome-only program (ex: Accounting (AAS)) – ALREADY DONE!
5. Have undeclared or undecided as 1st choice in drop down menu – ALREADY DONE!
6. Dual admissions listed as an option in the application but not explained on the website, so create a page and link to it from the application
7. The part of the health form that is about understanding the meningitis statement and emergency contact is on the admissions application so students only owe shot records (recognizing that there will need to be a plan for students under 18 who require a parent signature)
8. The downloadable pdf application needs to be designed so applicants can type directly in and submit it electronically (as opposed to print and handwrite in)
9. Don't list every sport on the application, just ask students if they are interested in athletics and then they get a follow-up message with link to the interest form – frees up space for health form text addition and lessens the impression that we're mostly focused on recruiting traditional-aged students

Steps to Enroll

1. Acceptance materials (which are minimal) explain placement testing needs and transcript credit evaluations, and for those that need to test give them information about preparing/studying
2. Enrollment checklist which is sent to students in the acceptance packet and online is very minimal and doesn't have contact information for multiple offices but rather just their advisor who has likely already reached out to them prior to them receiving this
3. Enrollment steps are presented in chunks
 - o For example under Getting Started is Find a Career Path, then apply, financial aid, transcripts, placement testing
4. Basic steps doesn't give the student every detail but just what they'll need to complete each one like tax forms or transcripts from other institutions so that it frames the experience for students but doesn't put the burden on them to carry the process
5. More detailed information is presented to students at a relevant time (ex: telling students about certificates of residency when it can actually be done)

Advisor (Single Point of Contact)

1. Advisors reach out to students soon after application, within 2-3 days
 - a. A detailed communication plan will be designed & implemented so the admissions office and advisors are working together on reaching out to students
2. Students are sent a video welcome from their advisor to introduce and welcome them (so they then have a face to put to the voice when they get calls or texts)
3. Advisors have dashboards in Argos that show all enrollment information about an individual student (ex: transcripts needed, testing exemptions, financial aid forms, health forms, etc.) and also a report that shows all students lacking a specific step (ex: certificate of residency) so targeted communication can be done to the right students at the right time
4. Incoming students have one person (the advisor) that helps them through the whole process rather than being passed between offices – the advisor takes the lead for sharing information & reaching out to the student to provide just-in-time communication including:
 - a. Results of credit evaluation of transcripts
 - b. If placement testing is needed & how to prepare (refer to study materials & prep classes)
 - c. Financial aid steps – when to apply, what steps remain, missing paperwork, who completed the fafsa but didn't complete the TAP application, etc.
 - d. How & when to apply for Foundation scholarships
 - e. Getting a job on campus
 - f. Set up appointment for advising & scheduling
 - g. Needing certificate of residency and to pay bill

- h. How to buy books, including anticipating if they'll need more than the initial limit because of their specific program or plans to buy a computer, etc.
 - i. Connecting to resources like accessibility resources, career counseling, vet services, etc.
 - j. Notes for the faculty mentor & other staff to read about initial career & academic & transfer conversations
5. All communication from the college to new students is a collaborative process between various offices and the advisor (ex: financial aid needs a form so the advisor reaches out to the student to help them complete it)
 6. There needs to be a set schedule of outreach for students stalled in their enrollment process (ex: 1 week passes and they haven't scheduled needed placement test the advisor reaches back out to the student to offer help)
 7. Advisors keep track of what students have transcripts and AP exam scores coming, and make sure they arrive and are evaluated, and update schedules as needed
 8. Intake relationships continue throughout their time so the advisor that helps a student through intake is their advisor for the whole time they're here
 9. Advisors take the lead in assisting non-matriculated students, helping them register and managing transcripts
 10. Advisors need significant support and training to tackle this new enhanced role to ensure that students have a consistent and quality experience across staff and campuses

Placement Testing

1. Admissions will determine what placement testing is needed based on high school/transfer transcripts and selected program
2. Admissions will record high school class grades for multiple measures tracking
3. Admissions or the advisor communicates to students in a timely manner what they need for testing and what exemptions they have, and how to prepare (refer to study materials & prep classes available)
4. When multiple measures are implemented to scale, the advisor is able to have a conversation with the students about class placement
5. Walk in testing is available in addition to scheduled appointments

Small Group Orientation

1. Is available online and on-campus, with all students having the same experience including STAR Day programs and those enrolling right before classes
2. Content is just focused on what they need to know at that point, not what they'll need to know later in their time as a student, it likely includes:
 - a. Maybe a welcome video from the college president?
 - b. Full time vs part time (what are credit hours, how much time in class and how much time studying)

- c. Connecting them to their programs
- d. Career information – how to make decisions and find specific information
- e. Career vs transfer programs (AAS, AOS, AS, AA, cert)
- f. Fun & excitement, mingling with other students
- g. College swag – possibly from schools
- h. Basic financial aid & scholarships
- i. Campus resources (small mention that they exist)

Advising & Scheduling

1. Students complete one intake survey in Starfish, that is the reservation form & advising survey & support services survey in one
 - Include question about preferred method of communication for the advisor to use in supporting enrollment (phone call, text, email, etc.)
 - Include questions about student needs, both academic and non-academic to help the advisor connect them to resources and anticipate problems they might encounter
 - Results will be stored electronically so other staff and faculty might view relevant parts during their time
2. Scheduling takes place during an individual appointment, following the small group orientation, for most students with a few possible exceptions for technical programs and others with minimal student choice
3. For the scheduling appointment advisors follow guidelines to ensure consistency in the student experience
4. Students can schedule advising appointments online, by calling, or by coming into the office & they get a text reminder
5. New student appointments start in May after current students are mostly set
6. If a class is canceled (ex: low enrollment) instead of just notifying the student they should help the student get into another class

Financial & Billing

1. Have the Student Verification & other financial aid forms online so students and families can complete them on their phones
2. Fall fafsa information is downloaded in mid-March so we need to let incoming students know when to expect information as many expect to get it earlier
3. Financial aid awards are currently 4 clicks into SIRS, it needs to be closer to the front/more accessible and easy-to-find
4. Students need all information related to money, financial aid, & billing at once from the college so expand financial aid award letters to clearly explain true costs (ex: additional program costs) and also information about foundation scholarships, how buying books works (options to rent, etc.), and explain work study (and how to apply if they didn't) and student assistant jobs

5. If financial aid award letters go out before acceptance the college should take steps to reach out to those students
6. Explore alternatives to the MVCC-specific Parent PLUS loan application that was instituted due to security problems with only using the online application
7. For each term advertise in advance the specific date that bills will be available and books can be purchased using financial aid

Career Counseling

1. Students continue to take the Career Coach assessment as a part of the advising survey
2. Create a career plan (which includes whether or not transfer is a part of the educational path) during initial advising, and advisors/mentors review and update it throughout a student's time
3. The career plan is started with results from student testing (interests, strengths, etc.) and then evolves to add comments from students and advisors about top choices and good next steps
4. Students are encouraged to meet with faculty mentors to explore career and transfer opportunities
5. Offer career workshops for pre-applicants
6. Have career courses for students interested in health professions and for undeclared students to help with exploration and decision making
7. Offer job shadowing experiences for all students, but especially for students who are undeclared and those planning to apply for a healthcare program

Other Enrollment Steps

1. Most of the intake conversation should be getting excited about being a student and joining an academic program rather than a focus on steps of paperwork to complete
2. Last minute students in August need additional help in prioritizing what steps to do with what timing
3. Add collecting missing social security numbers to the advisor checklist for students
4. Add confirming and updating type of student acceptance (ABTR) to the advisor checklist for students as IR needs to report this accurately
5. Credit evaluations are done quickly, on a predictable schedule, and communicated to the student by the advisor
6. Students should receive swag from the college and/or your school when you enroll

Convocation/Orientation (the day before classes start)

1. If a student misses orientation their advisor reaches out to provide the same information
2. Content to include:

- Fun & exciting
 - Campus tour to find classrooms
 - Meet faculty mentor
 - How to read a syllabus & what to expect for rigor
 - Campus resources, maybe a passport or something to encourage them to stop at tables in a fair
 - Give out planners
 - ID if you don't already have one
 - IT event like last year
3. Need to reinstate Welcome Week events for socializing as it is important for students to feel welcomed & connected
 4. Students transitioning from the Rome campus to Utica (as many start in Rome but eventually need to move to Utica to complete their programs) need support each semester so there should be a small orientation-type program to help them adjust

StrengthsQuest (Clifton Strengths for Students)

1. StrengthsQuest codes will be sent by the advisor on the first day of classes, they will track progress and work with students to have it completed by the 2nd week so CF100 instructors can help students use the results
2. In CF100 students will spend a class doing an introduction to Strengths and understanding their results, and then have at least one additional assignment about applying their strengths to their academics and/or career
3. Recreate the StrengthsQuest Ambassador team, a team of trained student leaders to do introductory presentations in all CF100 classes, and provide other Strengths programming throughout the year to help new students get the 4-6 touches needed to develop fluency

Interventions & Support Teams

1. The advisor leads a support team of Associate Deans/faculty/support services staff (like career and transfer services) that are organized by department and manage flags, interventions, and supports throughout their career
2. The support team regularly meets to talk about students of concern for the department and strategize interventions – faculty for a program need a common free hour during the week to allow this meeting
3. There are levels of needed intervention that the team will identify – some students need a phone call or help with one small problem whereas others need regular meetings and more intrusive supports
4. Advisors need to have a manageable caseload of 150 that allows intrusive case management
5. Advisors and all support services are assigned by school so they are more knowledgeable about programs

CF100

1. Solicit student feedback about the updates being developed and proposed for the course (workshopping, open forums, focus group, etc.)
2. Continue to run A-term (and B-term when needed) courses, requiring it for all degree-seeking students
3. Allow professional staff to teach this class during their regular workday
4. Have general sections for students in all programs rather than school-specific sections, with career information utilized in some assignments able to be school and even program specific
5. Revisit Career Coach inventory results as a starting point for the career development work
6. Class activities and assignments about increased career development and career planning information, such as research about job growth, needed skills, and salary
7. Utilize Career Coach for career information as it is an existing tool that students, advisors, and mentors already use
8. Help students prepare for their scheduled mentoring and advisor appointments
9. Learn about how to utilize college resources
10. Help students understand and use their strengths

1st Semester

1. Intro courses in program (ex: Intro to Human Services or Intro to Criminal Justice) have specific career content such as introducing students to the many careers within a field, etc.
2. Major fair (with faculty mentors) for students prior to advising/scheduling for spring, especially for undeclared students and those contemplating a major change
3. An advising day built into the calendar with no classes scheduled

Special Populations

(including students with disabilities, veterans, international students, adult learners, athletes, New Directions students, and adult learner cohort students)

1. Further discussion is needed about how the college can best meet the needs of these special populations in relation to the general population
2. All advisors would need training and skills to support students with a wide variety of special needs or circumstances

General College Processes

1. Currently offices and entities at the college contact new students but that should be limited so that students aren't overwhelmed with extra messages and have all enrollment communication go through the advisor
2. All offices should accept pictures of signed MVCC forms the same as faxed copies of signed paper forms (ex: rematriculation forms)
3. All forms should be electronic forms that can be signed electronically (on phones & computers) and don't require printed paper forms
4. The college should explore requesting shot records in bulk from high schools for students
5. The process for students to get emergency loans from ASC involves a great deal of running around for the student and should be streamlined, and also aligned with emergency loans through the foundation so that students know about them and can easily access both as needed

Unique Enrollment Events

1. Express Enrollment Days
 - a. Students can apply, be accepted, placement test, and meet with someone from financial aid in one visit to campus
 - b. Orientation, advisement & scheduling will need to happen on a second visit that can be scheduled that day (and can be done online if they can't return to campus)
 - c. Students and families can certainly meet with advisors to ask questions about their programs that day
2. STAR Days
 - a. Students will continue to test, complete orientation, and advisement/scheduling in one overnight visit
 - b. There may be updates needed for the schedule of events and what students are invited since we want students to meet with their assigned advisor for scheduling
3. Students Enrolling in the Final Weeks Before Classes
 - a. Many students who are scheduling in August were accepted prior to this time so advisors encouraging students to schedule sooner and an increased advisor staff should lessen the crunch typically felt during this time
 - b. Students still need to complete the same orientation (possibly online) and get the same-length advising appointment as students who registered earlier

Technology

1. Students need access to Blackboard & Starfish access upon acceptance to facilitate the advising/student support survey, holistic advisement/student support, and faculty mentoring

2. Starfish needs to be the main hub for tracking student progress and communication (use it as a case management tool) so all faculty & staff have access to it
3. Starfish needs to be usable by students on their cell phones, through an app or a web browser that is meant for phones as opposed to computers if we want them to engage with this technology
4. The “Starfish Manager” initiates staff/faculty training, and manages how we are using Starfish case management
5. Students need a live form on an existing platform (SIRS, Blackboard, or Starfish) that tracks their enrollment steps so that both the advisor and the student/family can see when things like shot records being submitted is complete
6. Possibly list completion of StrengthsQuest as an institutional requirement in DegreeWorks like DGV
7. Student goal (ex: transfer without a degree to a 4-year SUNY school) appears in the DegreeWorks header
8. The residence halls have a “save” in the deregistration process that should be available for all students that are working through the process with their advisor so that the advisor can Y them
9. The advisors need to be able to register students directly in banner without completing paper registration forms, both to make staff more efficient but also to make it a smoother process for a student who can then get service from either campus, at home, in their mentor’s office, etc.
10. Keep applying new student holds so students are required to meet with an advisor rather than self-advising, and continue the hold throughout their time at the college so that students can’t make changes to their schedules which have financial aid and academic implications
11. Information about who has a FERPA release needs to appear to all staff who might work with a student including advisors, faculty, and other support staff
12. Advisors have dashboards in Argos that show all enrollment information about an individual student (ex: transcripts needed, testing exemptions, financial aid forms, health forms, etc.) and also a report that shows all students lacking a specific step (ex: certificate of residency) so targeted communication can be done to the right students at the right time
13. Advisors have the ability to text individual students, not just group texting in Mongoose