AGENDA

SLU Business Manager Meeting
April 12, 2012
Learning Resource Center (Aud B)
9:00a.m.-10:30a.m.

1) Announcements – Allison Grapperhaus
   • Sign in Sheets
   • March and April What’s New?
   • Who’s New?
   • Future Business Manager Meetings
     ➢ Solicit input to enhance/expand meeting topics
     ➢ agiger@slu.edu or 7-2393

2) Hotel Ignacio – Jeff Hovey/Stacey Howlett (General Manager)

3) Check Processing Procedures – Rob Robbins (Development Services)

4) SLU Bicentennial SEM Plan – Jay Goff (Enrollment & Retention Management)

5) Employment Compliance Tips – Ellen Harmon (Consulting and Client Services)
Business Manager Meeting

Minutes of the Meeting of April 12, 2012

Meeting minutes of the Saint Louis University Business Managers held at 9:00 a.m. on Thursday, April 12, 2012 at Learning Resource Center (Aud B).

Business & Finance Staff Present:

Bruce Andres  Allison Grapperhaus
Anne Becker  Dave Heimburger
Mindy Fenton  Jeff Hovey
Peter Galazka  Tracy James
Annaliese Giordano  Janet Strader
David Grabe  Lisa Zoia

Attendance: 95
Number of Guests: 6
Number of Business and Finance Representatives Present: 12

Allison Grapperhaus welcomed everyone to the meeting and went over the agenda.

Discussion of Future Business Manager’s Meetings:
  • Contact Allison Grapperhaus (agiger@slu.edu) with suggestions and or/ideas for the meetings going forward.

Stacey Howlett (GM - Hotel Ignacio) – Hotel Ignacio (the presentation given can be found following the minutes):
  • Stacey Howlett introduced herself along with Rachel Crowley (Director of Sales), Shannon Thomas (Reservations).
  • New in 2012:
    o Sign: A new sign is in the works for the Hotel hopefully to draw attention.
    o Meeting Space: Located on the lobby level to be used for Conferences, Events and Entertaining.
  • Question: Will discounts be offered for SLU 101? Yes, 10% off best available rate. The rates fluctuate for SLU employees, any questions always call Stacey and she can assist you.
  • Question: Will the new meeting room be catered? Yes, it is catered by Triumph.

Rob Robbins (Development Services) – Check Processing Procedures (the presentation given can be found following the minutes):
  • It is the policy of the University that all gifts be processed through the Central Gift Processing Unit within Research and Development Services.
  • All gifts/donations brought to DuBourg Hall, room 319.
    o All gifts will be attached to a Gift Information Form
• The “safe monitor” will write out a receipt for the donation and provide a copy to the person dropping off the gift or put in an interoffice envelope.
  o After all paperwork is completed the special envelope will be dropped in the safe.
    ▪ The safe will be emptied three times a day and taken to the gift processors’ office.
• Any additional questions please contact:
  o Robert Robbins: 977-2882/ rrobin4@slu.edu
  o Tom Vincent: 977-3452/ tvincen2@slu.edu
• Question: Are the gift forms available online? No, but will be updated so they will be available online in the future.
• When the “thank you”/letter of acknowledgement go out, do the departments receive a copy of the letter for verification? No, but they can be and will implement them in the procedures from now on.

Jay Goff – (Enrollment and Retention Management) – SLU Bicentennial SEM Plan (the presentation given can be found following the minutes):
• What is Strategic Enrollment Management (SEM): Strategic enrollment management is a concept and process that enables the fulfillment of institutional mission and students’ educational goals.
  o This can be achieved by:
    • Establishing clear goals
    • Promoting students’ academic success
    • Promoting institutional success by enabling effective strategic and financial planning
    • Creating a data-rich environment
    • Improving process, organizational and financial efficiency and outcomes
    • Strengthening communications and marketing (BE a Billiken)
    • Increasing collaboration among departments across campus
• Core Enrollment Principles
  o No Enrollment Effort is successful without quality Academic Programs to promote
  o Recruitment and retention is an ongoing, multi-year process
  o SLU must clearly differentiate the student experience form competitor’s programs.
  o Must clearly address the student’s needs and engage students in all programs
• Core Understandings
  o We exist to help and serve students the best we can
  o Be honest and positive at all times
  o You are the University
• ERM Strategic Goals AY2011-12
  o Develop a 2012-17 Strategic Enrollment Management (SEM) Plan
  o Establish strategic enrollment targets and preferred student profiles
  o Develop the Undergraduate Retention Management Plan
  o Grow the TOTAL net tuition revenue
  o Build strategic partnerships with key domestic and international institutions
Factors most Noted in Choosing a College:
- Majors and career programs offered
- Location/campus characteristics
- Cost/affordability
- Campus size/safety
- Characteristics of Enrolled Students
- Selectivity

Question: Are the area St. Louis high schools being actively looked into for enrollment prospects? Yes, the admissions office is in regular contact with the St. Louis area high schools. There is also an online referral process if you have any student in mind that would make an excellent candidate for Saint Louis University.

Question: How are the projections thus far this Fall vs. last Fall? We are slightly ahead on freshman applications, slightly down on transfers, healthcare ALL on wait lists; overall on track for this year.

Question: How will Saint Louis University tuition rate compare to the top 50 in 2018? Saint Louis University will most likely be equal to or slightly lower in the tuition range.

Ellen Harmon – (Consulting and Client Services) – Employment and Compliance Tips (the presentation given can be found following the minutes):
- Focus on Interview Questions
  - Questions that can be asked during the Interview process:
    - Job Related Questions
      - Experience, education, interests, professional organizations involved in
    - Personal Questions
      - Legal name, over the age of 18, strengths, weaknesses
  - Questions that should be avoided during the Interview process:
    - Disability, medical history, race, age, marital status, pregnancy, religious affiliation
      - If an applicant raises the issue on such questions, carefully document the fact they brought it up and what they said.
- Any questions please contact Ellen Harmon 977-7263 / eharmon2@slu.edu

Elisabeth King – (Benefits and Compensation)
- Elisabeth briefly discussed that the benefits enrollment process will go back to first hire date for FY12 and are discussing start and end date changes for FY13.
- Reminder on Dependent Audit:
  - There is an ongoing dependent audit being performed. A letter and an email have been sent to all affected to submit paperwork by the deadline of May 11th. If documents are not received by deadline, the dependent will be dropped.
  - Any questions on the audit, contact Elisabeth King at 977-2366/ kingec@slu.edu
Stacey Howlett
General Manager
(314) 977-4410
stacey.howlett@hotelignaciostl.com

Rachel Crowley
Director of Sales
(314) 977-4413
sales@hotelignaciostl.com

Shannon Thomas
Reservations
(314) 977-4412
reservations@hotelignaciostl.com
Rachel Crowley
Director of Sales

• Group block contracts
• Negotiated rate information
  • Meetings
Shannon Thomas
Reservations

• Individual and group room reservations
  • Availability
  • Modify/cancel reservations
• All general reservation information
• Purchase Order information (PO #, reference guest name, Attn., charge info DB room & tax)
Stacey Howlett
General Manager

- Hotel information
- Sales & marketing
- Any and all hotel related questions
New for 2012
Hotel Ignacio Meeting Space

We look forward to our new meeting space located on the lobby level. This meeting space will be used for:

- Conferences
- Events
- Entertaining

The new meeting space will be designed to coordinate with the chic boutique style of the hotel and will have both wired and wi-fi internet, phone/fax capabilities, projector and screen.

COMING FALL 2012!
Questions?

Hotel Ignacio
(314) 977-4411
Gift Processing Policy

• It is the policy of Saint Louis University that all gifts be processed through the Central Gift Processing Unit within Research and Development Services. **There are no exceptions to this policy.**
Gift/Donation Drop-Off Procedure

• All gifts/donations will be brought to DuBourg Hall, room 319 during regular business hours (8:00am-5:00pm). You may send whomever you wish from your department to drop off the gift, including student workers.

• All donations will be attached to a Gift Information Form. These forms and/or other information that may be needed will be made available in DuBourg Hall, 319.
Gift/Donation Drop-Off Procedure (Continued)

• The donation and form will be attached by a staple (please do not use paperclips) and/or placed in a special envelope. The front of the special envelope will look like the following and must be filled out at the time of the donation dropped off in DuBourg 319.
Gift/Donation Drop-Off Procedure  
(Continued)

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Gift/Donation Drop-Off Procedure (Continued)

• The “safe monitor” (Bernice Carp and/or whoever is subbing for her) will write out a receipt for the donation and then give a copy of the receipt to the person dropping off the gift or put it in an interoffice envelope.

• After the paperwork is completed, the special envelope will be dropped in the safe.
Gift/Donation Drop-Off Procedure (continued)

- The safe will be emptied 3 times a day and taken to the gift processors’ office.
Gift Processing Flow

- **Mail (Direct Delivery)**
- **Online**
- **Treasurer’s Office**
  - Stock / Wire Transfers
- **Other SLU Personnel**

**Development Services**
- Gifts Batched & Copied (as necessary)
- Batches Prioritized & Processed (24 hrs)
- Checks Delivered to Cashier for Deposit (If after 3:00, checks held overnight in Dev Svcs Safe)

**Gift Info Form & Backup**
- Gift Information Forms available from Devlpt Services
- Acknowledgement / Receipt Mailed (48 hrs)
- Gift Backup Scanned & Filed; Daily Gift Reports Issued
Further Information

Robert Robbins
Director, Research and Development Services
Phone: (314) 977-2882
E-Mail: rrobbin4@slu.edu

Tom Vincent
Manager, Gift Processing
Phone: (314) 977-3452
E-Mail: tvincen2@slu.edu
Division of Enrollment & Retention Management

Jay W. Goff
ERM Vice President
SLU’s Desired Student Profile: 
*Building a Top 50 Student Body*

Spring 2012
What is Strategic Enrollment Management (SEM)?

Strategic enrollment management is a concept and process that enables the fulfillment of institutional mission and students’ educational goals.
The Purposes of SEM are Achieved by…

• Establishing *clear goals* for the number and types of students needed to fulfill the institutional mission

• Promoting *students’ academic success* by improving transition, persistence, and graduation

• Promoting institutional success by enabling effective *strategic and financial planning*

• Creating a *data-rich environment* to inform decisions and evaluate strategies
The Purposes of SEM are Achieved by…

• Improving process, organizational and financial *efficiency* and *outcomes*

• Strengthening *communications and marketing* with internal and external stakeholders

• Increasing *collaboration* among departments *across campus* to support the enrollment program
The Concept of Optimum Enrollment

Institutional Mission & Vision

- Race/Ethnicity
- Course Delivery Mode
- Undergrad/Grad
- Geographic Origin
- Programs/Courses
- Academic Profile
- Special Skills
- Program Capacity
The Student Success Continuum

Recruitment / Marketing

Orientation

Classroom experience

Co-curricular support

Degree/goal attainment

Student’s college career

Admission

Financial Aid

Academic support

Retention

The SEM Perspective
The Enrollment Planning Model

- Clear Mission and Goals
- Data Collection and Analysis
- Enrollment Infrastructure
  - Structure, Staffing, Skills, Systems, Service
- Strategies
- Tactics
- Meeting Goals

Typical starting point

Starting point for long term success
Core Enrollment Principles

• No Enrollment Effort is Successful without QUALITY Academic Programs to Promote

• Recruitment and Retention is an On-going, Multi-year PROCESS with Strong Access to Research and DATA

• +80% of Enrollments come from REGIONAL student markets for BS/BA degrees

• The Most Successful Recruitment Programs Clearly DIFFERENTIATE the Student Experience from Competitor’s Programs

• The Most Successful Retention Programs Clearly Address Students’ Needs and Regularly ENGAGE Students in Academic and Non-Academic Programs
Core Understandings

Division of Enrollment & Retention Management:

1. We exist to help and serve students the best we can.

2. Be honest and positive at all times. Never feel pressure to make things up or answer questions you do not know the answers to. Feel free to say, “I don’t know, but I will find out and get back to you.”

3. You are the university. Everything you say, how you look and act will be the guests vision and image of SLU. Take your role and the responsibility that goes with it very seriously.
Core Performance Expectations
Division of Enrollment & Retention Management

Managerial Philosophy:
Follow the “Platinum Rule” Do unto others as you would prefer them to do unto you

Student Service Philosophy:
Find ways to say “YES”

Operational Philosophy:
Make data based decisions & do the basics better than everyone else
ERM’s Vision

• To build and maintain student enrollments and success levels that will allow Saint Louis University to achieve the strategic vision of being recognized as one of the top 50 US national universities.

• The ERM division desires to be a global leader in best practice student enrollment and success practices. As a division we gauge our efforts not just on what we see before us, but make sure to strive to reach the highest standards of the enrollment management field.
ERM’s Values

1. SERVICE:
   We are a student-centered community. When we establish policies, make decisions or take actions; we do so with the best interest of students in mind.

2. EXCELLENCE:
   We look for opportunities to exceed the expectations of those we serve through efficient and effective processes.

3. INTEGRITY:
   We conduct ourselves in a truthful, moral and honorable fashion.

4. TEAMWORK:
   We respect our staff, faculty and administration, as we work together for the common good. We actively work to enhance collaboration within the University and our communities by building healthy and supportive partnerships.

5. LEARNING:
   We seek to make data-driven decisions and provide significant learning opportunities through training and participation.

6. RESPECT:
   We seek and support diversity in our programs and participants. We value the ideas and needs of internal and external constituents.
ERM Strategic Goals AY2011-12

I. Develop 2012-17 Strategic Enrollment Management (SEM) Plan

II. Establish strategic enrollment targets & preferred student profiles

III. Develop the Undergraduate Retention Management Plan

IV. Grow the TOTAL Net Tuition Revenue

V. Build strategic partnerships with key domestic and international institutions
Building a “Top 50” Student Profile

• SLU’s Desired Student Profile for 2018
  – ACT/SAT: Upper 10% in nation (27.8)
  – GPA: +3.5/4.0
  – US Geographic: 50 States Represented
  – International: 10%-15%
  – Catholic: 45-50%
  – Minority: 13-15%
  – Military/VA: 5-10%
  – Transfer: 15%-20%

• Student Success Targets
  – 90% 1-2 year retention rate
  – 80% 6 year graduation rate
ADMISSION BY THE NUMBERS
Factors Most Noted in Choosing a College

- Majors & Career Programs Offered
- Location/Campus Characteristics
- Cost/Affordability
- Campus Size/Safety
- Characteristics of Enrolled Students
- Selectivity
Keys to Attracting and Enrolling Students

1. Personal Contact
2. Counseling and addressing financial concerns up front and often
3. Timely Follow-up
4. Targeted Marketing
5. Diverse Visit Opportunities
6. Student to Student Interaction
7. Alumni to Student Interaction
Highest Yielding Enrollment Activities

- Campus Visit
  - Over 75% of the students who visit campus apply.
  - About 28% of these applicants enroll.
  - An average of 70% of students that attend a yield program enroll.

- Interviews

- Financial Aid appointments

- Tele-counseling
  - Increases students attendance at HS/CC visit, receptions & campus visitation

- Regular Communication/Relationship Development
Annual Enrollment Activities

- 9 Select Saturdays (1350 student and guests)
- 2 Admitted Student Days (795 students and guests)
- 2 of Preview Days (796 students and guests)
- 3 Scholarship Weekends (627 students and 856 guests)
- 28 Off-Campus Receptions (804 attendees)
- 97 Group Visits (3434 students)
- 77 Community College Visits and Transfer Fairs (Transfer)
- 117 College Fairs (HS)
- 1108 High School Visits
- 173 Alumni attended College Fairs
- 11429 of Individual Tour Visitors in July 2010-June 2011
Direct Contact Activities

- 37,875 Telecounseling Calls Made
- Over 16,000 Staff Calls Made
- 667 Chat participant
- 646 Faculty Calls
- 1,606 Parent to Parent Calls
- 12,481 Handwritten Notes Sent
- 665 Interviews
- 1238 + Financial Aid Appointments
Direct Mail by the Numbers

- 12,000 inquiry cards
- 5,020 web inquiries
- 162,137 of event invitations
- 20,714 of search brochures
- 57,931 of viewbooks
- 315,000 of apply now emails
- 9,740 admit packets
E-Communications by the Numbers

- 2 Million+ mass emails in 2010-11
- 5,020 On-line info requests
- 2,050 On-line individual Campus Visit Registrations
- 404 different email campaigns sent
- 15 On-line Chat Sessions
- 7 Virtual College Fairs
- Most Read E-mails
  1. Parent Newsletter – 9016 40.4%
  2. Admitted Student Newsletter - 7468 32.6%
  3. Apply online – 84,000 13.1% of those who received
Developing Strategic Enrollment Targets
How do we increase the rank/stature/reputation of Saint Louis University?
What will Billikens in 2018 Look Like?
What is included in a SEM Plan?

1. Strategic Framework: Mission, Values, Vision
2. Overview of Strategic Plan Goals & Institutional Capacity
3. Environmental Scan: Market Trends & Competition Analysis
4. Evaluation and Assessment of Position in Market
5. Enrollment Goals, Objectives, & Assessment Criteria
6. Marketing and Communication Plan
7. Recruitment Plan
8. Retention Plan
9. Student Aid and Scholarship Funding
10. Staff Development and Training
11. Student/Customer Service Philosophy
12. Process Improvements and Technology System Enhancements
13. Internal Communication and Data Sharing Plan
14. Campus wide Coordination of Enrollment Activities
Projected change in the number of high school graduates, 2009-10 to 2019-20

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SLU Freshmen Admits for Fall 2012 as of 12-05-11
Retention Study Update

Student Factors

Academic Behaviors

SLU Academic Performance

SLU Social Integration, Satisfaction, and Commitment

Academic Preparation

Financial Situation

Homesickness

Stress

Campus Involvement

Family Support

Retention
The Power of Alignment
Open Discussion
Employment Compliance Tips – Focus on Interview Questions

Presented by: Ellen Harmon, Sr. Human Resources Consultant
Making good decisions during the hiring process is crucial to the University.

The best way to predict future performance is to examine past and present performance similar situations.

Provide the applicant with details of a situation and ask how they have handled similar situations in the past.
What Questions Can Be Asked During the Interview Process?

Ask job-related questions:
1. What experience do you have similar to the job you are seeking?
2. What education do you have relevant to the job duties?
3. Why are you interested in this job?
4. Are you involved in any professional organizations related to the position?
5. What background do you have that would be helpful in...

Ask relevant personal questions:
1. What is your legal name?
2. Have you used other names that may appear on degrees or that were used with prior employers?
3. Are you over the age of 18?
4. What are your long term professional goal?
5. What are your strengths?
6. What are your weaknesses?
7. How do you establish new working relationships?
Lab positions:
Ask the candidate to describe their experience(s) with an instrument they may use for research.

Clerical positions:
What are some of the positive things about working in the clerical field? What is the busiest work situation you’ve encountered? How did you handle the stress?
What Questions Should be Avoided During the Interview Process?

You should NOT ask about an applicant’s:

- Actual or perceived disability
- Medical history
- Race
- National Origin
- Age
- Marital status
- Childbearing or pregnancy
- Religious affiliation
- Military status
Compliance with ADA During the Interview Process

- Employees and potential employees should be able to perform the “essential functions” of their job – either with or without accommodation. The term *essential functions* means the fundamental job duties of the employment position.

- For example, *essential functions* of a painter include applying paints, varnishes, and lacquers to surfaces of furniture, equipment, walls, and woodwork using brushes, rollers, and spray guns. This would require the ability of the employee to reach, lift, bend and squat, as well as have the ability to see if the paint has been applied evenly and thoroughly.

- Employees and potential employees with a disability may need “reasonable accommodations” to perform the essential functions of their job.

- *Reasonable accommodations* are adjustments made to the workplace that allow a qualified individual with a disability to perform essential functions of the position.

- *Reasonable accommodations* may include such things as obtaining or modifying work equipment or devices or providing a flexible schedule to enable the individual to perform the essential functions.
Painters may need to climb and balance on ladders, reach overhead, and stand for long periods of time.

An employee with an office position may need to work at a computer, be able to focus on a project for extended periods of time, make decisions, and pay attention to detail.
Questions Relating to Disability

Unacceptable Questions:
• Do you have a disability?
• Do you have any physical defects that would prevent you from performing certain work?
• How severe is your disability?

Acceptable Questions:
• Can you perform the essential functions of the job, with or without accommodation?

REMEMBER - ADA protections extend to the hiring process
You should not initiate questions regarding an applicant’s disability or perceived disability

If the applicant raises the issue – *carefully* document that they brought it up and what they said.

If they initiate the discussion, you can ask if they can perform the essential functions of the job with, or without, accommodation.

Some applicants may need accommodations just to apply for a job, such as a hearing impaired person may need an interpreter.
Questions Relating to Age

Age discrimination laws apply to people who are over 40 y.o.

Interviewers should avoid questions that could lead the applicant to believe that his or her age will play a role in the hiring decision.

Unacceptable Questions
- How old are you?
- What year did you graduate from high school?
- When do you intend to retire?

Acceptable Questions
- Are you at least 18 years of age?
Questions Relating to Family

Unacceptable Questions
- Are you planning to have children?
- Are you pregnant or do you plan on becoming pregnant soon?
- Are you married?
- What does your husband/wife do?
- What are your child care arrangements?

Acceptable Questions
- Can you work the required department schedule?
- You maybe required to work some nights and weekends, is that a problem?

Employment decisions must not discriminate against women who are pregnant or planning to become pregnant in the near future.
Questions Relating to National Origin

Unacceptable Questions
• Are you a citizen of the United States?
• What country are you from?
• What is your native language?
• Where were you born?

Acceptable Questions
• Are you legally eligible to work in the United States?
• Do you speak multiple languages, if so what are they?
Questions Relating to Medical History/Illness

Unacceptable Questions

• Have you ever been treated for any medical conditions?
• Does your family have any history of medical problems?
• How much sick/FMLA leave did you use at your last job?
• Do you smoke?
• Have you ever filed for workers’ compensation?

Acceptable Questions

• Generally, NONE!
• Again, if they raise the issue, carefully document what they said.

Genetic Information Nondiscrimination Act (GINA) prohibits employers from discriminating based on genetic information. This includes prohibiting questions about information about medical tests, hereditary disorders, and history of family illnesses.
Questions Relating to Religion and Hiring for Mission

SLU doesn’t discriminate due to diverse religions. We are not hiring based on what religion an applicant supports, but whether they are willing and able to support the Saint Louis University mission.

Unacceptable Questions
• What religion do you practice?
• What religious holidays do you observe?
• Do you attend church every week?
• Are you Catholic or Christian?

Acceptable Questions
• What do you know about the mission of Saint Louis University?
• Are you willing and able to support that mission?
• How do you think your experience prepares you to support the SLU mission?
Military Service

If an applicant mentions military service –

DO NOT:
• Ask about current status, discharge reasons, or dates of service; or
• Ask about anticipated military leave.

DO:
• Ask about how their experience may contribute to their success as an employee of Saint Louis University.
What Questions do you have?

Contact information:

Ellen Harmon
Senior Human Resources Consultant
(314) 977-7263
eharmon2@slu.edu