



**Form 2: Justification: One-Time Budget Request  
2017-2018**

**Division: Student Affairs**

**Department / Unit: Undergraduate Admission**

Instructions: One page per item listed on Form 1.

**Each justification MUST link to at least one specific strategic initiative from the WCU Strategic Plan, 2020**

***Vision: Focusing our Future*. Justification narrative below must:**

- 1) include a brief statement of how the request advances or fulfills the strategic initiative(s) identified.**
- 2) address outcomes from administrative and/or accreditation review.**

Priority Number	Budget Request	Strategic Initiative(s) Number (e.g. 3.1.2)	Cost
1	Set up cost for new Admission CRM Software System	1.6.1; 6.3.1	\$122,000

**Brief Justification:**

The Undergraduate Admissions office at WCU needs to purchase and implement a new Customer Relationship Management (CRM) system this summer in advance of the 2017-18 recruitment cycle because the current CRM product will sunset in October 2017. CRM products provide Admissions offices with the ability to track interest and conduct outreach for prospective students; manage recruitment events and campus tours and registrations for those events; create and operate communication flows to students, parents, counselors and other audiences; analyze and plan strategically; operate more efficiently; and assess more accurately. Combining all of this into one tech solution is much more feasible than having to find separate solutions and making them all work together cohesively. It would also be more costly to purchase and implement multiple platforms than just one which comes with cost savings. The Office of Admission has enlisted the expertise of ITS and others on campus through the RFP process, and a top vender has been identified and approved by Purchasing. The selected product is more comprehensive and expansive in scope than the system that is expiring. As such, the cost for the product is greater than the cost of the current system, and nonrecurring start-up costs are needed to get the system operational. This selected vendor would also result in reducing the number of CRM systems on campus because Graduate School and Research uses the same company.

VC Priority # \_\_\_\_\_

**Form 2: Justification: One-Time Budget Request  
2017-2018**

**Division: Student Affairs**

**Department / Unit: University Scholarships**

Instructions: One page per item listed on Form 1.

**Each justification MUST link to at least one specific strategic initiative from the WCU Strategic Plan, 2020**

***Vision: Focusing our Future*. Justification narrative below must:**

- 1) include a brief statement of how the request advances or fulfills the strategic initiative(s) identified.**
- 2) address outcomes from administrative and/or accreditation review.**

Priority Number	Budget Request	Strategic Initiative(s) Number (e.g. 3.1.2)	Cost
2	Set up cost for new Scholarship Software System	1.6.5	\$11,000
<b>Brief Justification:</b>			
<p>The scholarship management system will be an all-inclusive software product that allows for the collection of online applications from students, web-based review portal, scholarship renewal management, fund tracking, communication, and reporting. This product serves as the management tool for our endowed scholarships which are expected to increase in number during the campaign as part of WCU's 2020 Strategic Plan. The system is intended to serve graduate and undergraduate students- both continuing and incoming, as well as facilitate the selection process for university and academic department committees.</p> <p>The structure of our current system is not meeting our business process needs. For instance, we do not have the ability to set deadlines by scholarship, which means we cannot accommodate scholarships specifically for graduate students or those that occur off-cycle per the donor gift agreement. We do not have the ability to extend deadlines for scholarships for which there are no applicants during the application cycle. We cannot manage renewals in the system without reapplication from the student. We cannot work in more than one year at a time to select new recipients when students withdraw or become otherwise ineligible for scholarships if the application is already available for the following year. All of these issues equate to many manual paper processes during the course of an academic year, which is inefficient and less than ideal for record-keeping and audits. We are also faced with some compliance issues surrounding departmental reporting if errors are made- either in fund amount or recipient name.</p> <p>With the anticipated increase in endowed scholarships resulting from the campaign and a potential increase in application volume due to NC Promise, this process needs to be as streamlined as possible. As a point of reference, more than 6,300 students have started the application process for 2017-2018 with approximately one week left until the application deadline.</p>			

VC Priority # \_\_\_\_\_

## Form 3: Prioritized List of Recurring/Ongoing Budget Requests 2017-18

**Division: Student Affairs**

**Department/Unit: Undergraduate Admission, University Scholarships, New Student Orientation**

Instructions: List all recurring/ongoing budget requests in priority order. Complete and attach a *Justification: Recurring/ Ongoing Budget Request* (Form 4) for each item listed. Form originator should calculate and include fringe benefits of 23.77%. In addition, for each new 1.0 FTE, include \$5,753 for the employer portion of health insurance.

Priority Number	Budget Request	Cost
1	Cost difference between current CRM and new CRM	\$52,000
2	Royall contract increase	\$45,700
3	Expanded inquiry pools for sophomores	\$43,580
4	Assistant Director for New Student Orientation	\$49,073
5	New Scholarship Software System	\$30,000
<b>Total</b>		<b>\$220,353</b>

## Form 4: Justification: Recurring/Ongoing Budget Request 2017-18

**Division: Student Affairs**

**Department/Unit: Undergraduate Admission**

Instructions: One page per item listed on Form 3.

**Each justification MUST link to at least one specific strategic initiative from the WCU Strategic Plan, 2020 Vision: *Focusing our Future*. Justification narrative below must:**

- 1) include a brief statement of how the request advances or fulfills the strategic initiative(s) identified.**
- 2) address outcomes from administrative and/or accreditation review.**

Priority Number	Budget Request	Strategic Initiative(s) Number (e.g. 3.1.2)	Cost
1	Cost difference between current CRM and new CRM	1.6.1; 6.3.1	\$52,000
<p><b>Brief Justification:</b>            The Undergraduate Admissions office at WCU needs to purchase and implement a new Customer Relationship Management (CRM) system this summer in advance of the 2017-18 recruitment cycle because the current CRM product will sunset in October 2017. CRM products provide Admissions offices with the ability to track interest and conduct outreach for prospective students; manage recruitment events and campus tours and registrations for those events; create and operate communication flows to students, parents, counselors and other audiences; analyze and plan strategically; operate more efficiently; and assess more accurately. Combining all of this into one tech solution is much more feasible than having to find separate solutions and making them all work together cohesively. It would also be more costly to purchase and implement multiple platforms than just one which comes with cost savings. The Office of Admission has enlisted the expertise of ITS and others on campus through the RFP process, and a top vendor has been identified and approved by Purchasing. The selected product is more comprehensive and expansive in scope than the system that is expiring. As such, the cost for the product is greater than the cost of the current system, and nonrecurring start-up costs are needed to get the system operational. This selected vendor would also result in reducing the number of CRM systems on campus because Graduate School and Research uses the same company.</p>			

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## Form 4: Justification: Recurring/Ongoing Budget Request 2017-18

**Division: Student Affairs**

**Department/Unit: Undergraduate Admission**

Instructions: One page per item listed on Form 3.

**Each justification MUST link to at least one specific strategic initiative from the WCU Strategic Plan, 2020 Vision: *Focusing our Future*. Justification narrative below must:**

- 1) include a brief statement of how the request advances or fulfills the strategic initiative(s) identified.**
- 2) address outcomes from administrative and/or accreditation review.**

Priority Number	Budget Request	Strategic Initiative(s) Number (e.g. 3.1.2)	Cost
2	Royall Contract Increase	1.6.1; 6.3.1	\$45,700
<p><b>Brief Justification:</b>            Inflationary costs and an increase in the number of high school students population and the number who are taking standardized tests result in increased costs within our contracts with partners and collaborators related to lead generation; application submission; electronic and print communication; secure data transfer of documents; and outreach to potential students, their parents, and school counselors. Necessary modifications for the upcoming year related to unfunded mandates (e.g., application and data import changes related to mandated implementation of the Residency Determination System) add annual costs. The vast majority of cost increases related to “pass through” costs—purchase of additional lead names, and print and postage costs associated with communication to the leads. WCU is already obligated to this cost increase because of the multi-year bid and contract that is in effect.</p>			

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## Form 4: Justification: Recurring/Ongoing Budget Request 2017-18

**Division: Student Affairs**

**Department/Unit: Undergraduate Admission**

Instructions: One page per item listed on Form 3.

**Each justification MUST link to at least one specific strategic initiative from the WCU Strategic Plan, 2020 Vision: *Focusing our Future*. Justification narrative below must:**

- 1) include a brief statement of how the request advances or fulfills the strategic initiative(s) identified.**
- 2) address outcomes from administrative and/or accreditation review.**

Priority Number	Budget Request	Strategic Initiative(s) Number (e.g. 3.1.2)	Cost
3	Expanded inquiry pools for sophomores	1.6.1; 6.3.1	\$43,580
<b>Brief Justification:</b>			
<p>The 2020 Vision speaks directly to the importance of healthy and strategic enrollment as part of its access mission, in relation to student success, and in regards to university sustainability. Effective student recruitment is heavily dependent upon expanded lead generation--obtaining names, contact information, and other information about individuals who may be potential applicants--and communication methods and modes to those leads. In many cases, leads have to be contracted or purchased (e.g., from entities such as College Board, ACT, National Research Center for College and University Admissions (NRCCUA), etc.). Admissions also partners with others (e.g., Education Advisory Board--Royall and Co., Cappex, Hobsons, College Foundation of North Carolina) to get our name in front of potential students and to communicate with the leads that are obtained. As competition for college students continues to intensify and as students and their families shop longer and later for the right college (even to the point of attending multiple orientations), costs associated with recruitment and communication continue to escalate. For example, North Carolina shifted from an SAT to an ACT state, and NC began covering the costs for public high school juniors to take the ACT. Whereas less than half of the public school seniors in North Carolina were taking the ACT prior to the change, last year 99% of NC public school juniors took the ACT. Acquiring the names and information of this increased pool of leads and communicating with them once the information is acquired mean significant increased costs. Additional recurring dollars are needed to be able to cover these expanded lead generation and communication costs.</p>			

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## Form 4: Justification: Recurring/Ongoing Budget Request 2017-18

**Division: Student Affairs**

**Department/Unit: New Student Orientation**

Instructions: One page per item listed on Form 3.

**Each justification MUST link to at least one specific strategic initiative from the WCU Strategic Plan, 2020 Vision: *Focusing our Future*. Justification narrative below must:**

- 1) include a brief statement of how the request advances or fulfills the strategic initiative(s) identified.**
- 2) address outcomes from administrative and/or accreditation review.**

Priority Number	Budget Request	Strategic Initiative(s) Number (e.g. 3.1.2)	Cost
4	Assistant Director for New Student Orientation	4.1.1; 4.3.5	\$35,000
<p><b>Brief Justification:</b></p> <p>The Office of New Student Orientation is one of the departments under the direction of Undergraduate Enrollment within the Division of Student Affairs. The mission of New Student Orientation is to connect students and their families with the university community, inform them about university resources and create a system of support for them in order to influence student success from orientation to graduation. This position is integral to the ongoing success of all new students through cooperative programming with other university constituents with an emphasis on transition, retention and success. The Assistant Director will also provide leadership to Orientation in the absence of the Director. New Student Orientation is responsible for transitioning over 4500 first year students, transfer students and their families throughout their careers at Western Carolina University. This position will assist throughout the academic year and summer with the promotion, selection, training, supervision and evaluation of orientation counselors who work with new students and their families.</p>			

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## Form 4: Justification: Recurring/Ongoing Budget Request 2017-18

**Division: Student Affairs**

**Department/Unit: University Scholarships**

Instructions: One page per item listed on Form 3.

**Each justification MUST link to at least one specific strategic initiative from the WCU Strategic Plan, 2020 Vision: *Focusing our Future*. Justification narrative below must:**

- 1) include a brief statement of how the request advances or fulfills the strategic initiative(s) identified.**
- 2) address outcomes from administrative and/or accreditation review.**

Priority Number	Budget Request	Strategic Initiative(s) Number (e.g. 3.1.2)	Cost
5	New Scholarship Software System	1.6.5	\$30,000
<p><b>Brief Justification:</b></p> <p>The scholarship management system will be an all-inclusive software product that allows for the collection of online applications from students, web-based review portal, scholarship renewal management, fund tracking, communication, and reporting. This product serves as the management tool for our endowed scholarships which are expected to increase in number during the campaign as part of WCU's 2020 Strategic Plan. The system is intended to serve graduate and undergraduate students- both continuing and incoming, as well as facilitate the selection process for university and academic department committees.</p> <p>The structure of our current system is not meeting our business process needs. For instance, we do not have the ability to set deadlines by scholarship, which means we cannot accommodate scholarships specifically for graduate students or those that occur off-cycle per the donor gift agreement. We do not have the ability to extend deadlines for scholarships for which there are no applicants during the application cycle. We cannot manage renewals in the system without reapplication from the student. We cannot work in more than one year at a time to select new recipients when students withdraw or become otherwise ineligible for scholarships if the application is already available for the following year. All of these issues equate to many manual paper processes during the course of an academic year, which is inefficient and less than ideal for record-keeping and audits. We are also faced with some compliance issues surrounding departmental reporting if errors are made- either in fund amount or recipient name.</p> <p>With the anticipated increase in endowed scholarships resulting from the campaign and a potential increase in application volume due to NC Promise, this process needs to be as streamlined as possible. As a point of reference, more than 6,300 students have started the application process for 2017-2018 with approximately one week left until the application deadline.</p>			

VC Priority # \_\_\_\_\_

## Form 5: University-wide Initiatives 2017-18

**Division: Student Affairs**

**Department/Unit: Financial Aid**

Instructions: List recommended university-wide initiatives budget requests in priority order. Complete and attach a *Justification: University-wide Initiatives Budget Request* (Form 6) for each item listed. Form originator should calculate and include fringe benefits of 23.77%. In addition, for each new 1.0 FTE, include \$5,753 for the employer portion of health insurance.

Priority Number	Budget Request	Cost
1	Financial Aid Verification Shared Service	\$50,000
<b>Total</b>		<b>\$50,000</b>

**Form 6: Justification: University-wide Initiatives  
2017-18**

**Division: Student Affairs**

**Department/Unit: Financial Aid**

Instructions: One page per item listed on Form 5.

**Each justification MUST link to at least one specific strategic initiative from the WCU Strategic Plan, 2020**

***Vision: Focusing our Future.* Justification narrative below must:**

- 1) include a brief statement of how the request advances or fulfills the strategic initiative(s) identified.**
- 2) address outcomes from administrative and/or accreditation review.**

Priority Number	Budget Request	Strategic Initiative(s) Number (e.g. 3.1.2)	Cost
1	Financial Aid Verification Shared Service	5.1.1; Compliance	\$50,000

**Brief Justification:**

A finding of the North Carolina General Assembly's Joint Legislative Program Evaluation Oversight Committee was the University of North Carolina system lacked comprehensive approaches to operational efficiencies. As a result, the Financial Aid Verification Shared Service project started in 2012. The shared service is intended to provide a one-stop financial aid verification process for financial aid applicants. It is an effort to eliminate duplicate verification requests for students who apply to more than one UNC school and streamline and standardize the financial aid verification process and reduce processing costs. Western Carolina University began participation in the 2014-15 academic year. The cost of the service is covered by General Administration for 2014-15 and 2015-16. Starting with academic year 2016-17, Western Carolina University will be responsible for the costs associated with the service. The cost for the 2014-2015 academic year was \$74,393.50. However, WCU Financial Aid is exploring cost-cutting measures related to verification shared service that might bring the costs down. Also, there is an upcoming change, effective October 1, 2016, for financial aid to move to prior prior year tax information on the Free Application for Federal Student Aid which should help to lessen the number of students selected for verification; thus, we are projecting a need of \$50,000 to cover verification shared service costs.

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