Strategic Enrolment Management Assessment

AACRAO Consulting Report for Thompson Rivers University

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Project Overview

AACRAO Consulting was engaged by Thompson Rivers University (TRU) to assess its Strategic Enrolment Management (SEM) processes and strategies, and to provide long-term assistance in the development of a comprehensive SEM plan. The goal of the consultation is to provide TRU with a long-term SEM plan that includes data-informed strategies and tactics to meet enrolment goals in consideration of recent declines in domestic enrolment and increases in international students.

This report provides the results of the assessment. It allows TRU to address policy, staffing and operational issues that could inhibit the success of the forthcoming SEM plan. Recommendations are provided in actionable steps that TRU can take to ensure its operations are aligned with best practices and that the Strategic Enrolment Management strategies, including recruitment and retention efforts, are being deployed to ensure long term enrolment success.

Project Deliverables

Project deliverables include a Strategic Enrolment Management assessment, along with:

⇒ A review of the application of best practices in Strategic Enrolment Management in TRU enrolment management departments, including:
  • Organisational structure
  • Efficiency of policies and practices
  • Communications with students, including marketing materials

⇒ A review of how the application of Strategic Enrolment Management is impacting enrolment of new/potential students and recommendations for enhancing services.

⇒ An assessment of the efficiency and effectiveness of Strategic Enrolment Management services from a student perspective.

⇒ Evaluation of the use of electronic/virtual student services and technology to support related internal business processes.
  • This includes the website and all student self-service on-line support
Evaluation of how data is collected, maintained, and accessed for use in making strategic enrolment decisions.

Application of best practices in enrolment management strategies, including recruiting and retaining students.

Analysis of enrolment trends in the TRU market and in relation to its enrolment goals.

Evaluation of current short-term and long-term enrolment goals and potential limitations that could potentially impede meeting enrolments goals.

TRU must now balance the implementation of the recommendations in this report while simultaneously creating the long-range SEM plan. As it thinks strategically about its long-range enrolment health, it must also act on short-range issues to lay a more solid foundation for the implementation of the strategies and tactics of the plan, so that TRU can reach its enrolment goals.

**Pre-Visit Activities**

The consultants and the TRU project team met during the AACRAO Strategic Enrollment Management Conference on November 11-13, 2018 to begin pre-visit discussions. This was followed-up with phone conference calls on December 4, 2018 and January 14, 2019, which clarified the project deliverables, finalized the structure for the project, and coordinated visit logistics for the first on-site consulting visit on February 11-12, 2019. The TRU project team created a sync.com drop box and uploaded a wide array of TRU publications and related external documents to support the consulting project. Access to the project is limited to the project team and the consultants.

**On-Site Activities**

A two-day campus visit was conducted on February 11-12, 2019, which included scheduled interviews with a wide variety of staff, administrators, faculty, and students, as listed in Appendix A. Additional materials were provided on-site. In addition, several follow-up e-mails and phone calls were exchanged for the purposes of clarification.
The campus visit demonstrated that TRU has a competent and enthusiastic staff and faculty who are interested in supporting enrolment management and student success.

**Post-Site Activities**

The TRU project team added publications to the sync.com drop box that were identified during discussions between the consultants, the project team, and interviewed faculty, staff, and students.

**Executive Summary**

Thompson Rivers University (TRU) is a public post-secondary educational institution, funded by the Province of British Columbia (BC) through the Ministry of Advanced Education, Skills and Training. TRU’s Kamloops and Williams Lake campuses are located on the traditional territory of the Secwepemc peoples, in BC’s southern interior. 15,019 students study on campus in Kamloops, Williams Lake, or at one of the regional centres in 100 Mile House, Clearwater, Barrier, Ashcroft, and Lillooet. 14,983 students attend classes throughout the world either by distance or online. Approximately 16% are international students. TRU aims to be “a comprehensive, learner-centred, environmentally responsible institution that serves its regional, national, and international learners and their communities through high quality and flexible education, training, research and scholarship.”\(^1\) TRU is seeking institutional accreditation with the Northwest Commission on Colleges and Universities, based in Washington State. Accreditation will provide a marketing advantage for TRU as it looks to attract students from outside of Canada.

TRU has five institutional priorities. While all are related to effective Strategic Enrolment Management, four institutional priorities are directly impacted by the institution’s enrolment management practices, including:

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Priority 1: Increasing student success.

Priority 2: Increasing intercultural understanding.

Priority 4: Increasing entrepreneurial capacity.

Priority 5: Increasing sustainability.²

TRU’s Academic Plan³, which was developed in 2011, identifies four academic themes: science, technology, and applied skills in society; power, politics, and social justice; health, well-being, and leisure; and environmental, economic, social, and cultural sustainability. It also focuses on five academic foundations: inquiry-based and creative learning; interdisciplinary approaches; Indigenous, local and global cultural awareness; flexible learning options; and life-long learning.

TRU is currently engaging in a visioning exercise after which it will develop a new academic plan. It is anticipated that the new academic plan and SEM plan will serve to establish and manage student enrolment priorities.

A look at leading enrolment trends underlines the important role enrolment management plays in supporting the institution’s enduring goals. Canada, in general, has an aging population. This means there are fewer high school aged people available to enter post-secondary education. These demographic trends are present in BC and within the Thompson Nicola and Cariboo regions. There are currently fewer under-15 years old people in BC than elsewhere in the nation.⁴ The anticipated decline in the Thomson Nicola public school population is projected to continue until reaching 2015 levels in 2025.⁵ Additionally, the rate by which high school students from the Thompson Nicola region transition directly into post-secondary education

fluctuated from between 40% and 45% in the past decade while the BC average for students transitioning to post-secondary education ranged from 50% to 55%. Further, the number of 15-19 year old people is expected to grow by only 2% in the next decade. Much of this population is based in the more populous Lower Mainland part of the province in, and near, Vancouver. This is, however, a considerable number of students TRU could attract with a strong SEM plan and infrastructure.

The Indigenous population is the fastest growing demographic segment in Canada. At present, 16% of the Indigenous population in Canada live in BC and approximately 26,000 live in the TRU catchment area. Further, there is a big educational gap between Indigenous and non-Indigenous peoples, particularly among those with a post-secondary educational qualification. Financing post-secondary education continues to be a concern for many prospective students. The Provincial Government has taken steps to alleviate some of these concerns by eliminating interest on BC Government student loans, establishing a $1,000 completion grant program for graduates, introducing a new graduate student scholarship fund, eliminating fees for adult basic education and English-language learning programs, and implementing a Provincial Tuition Waiver Program. There is, however, room for strategic development of institutional scholarships and bursaries.

Looking at TRU SEM Funnel Trends Dashboard data (see Table 1) for domestic students, applications have varied from a low of 7,173 in fall 2018 to a high of 9,285 in fall 2016 for an average eight-year application total of 8,098, which suggests that the fall 2018 application total was 925 students below the eight-year average. This may be partially due to implementation of

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the changed process requiring transcripts to be received prior to processing applications. Similarly, the average admission offer rate, which ranged from a low of 55% in fall 2018 to a high of 79% in fall 2011 for an average eight-year offer rate of 63%, indicates that the fall 2018 admission offer rate was 7% less than the average eight-year admission offer rate. TRU benefitted from achieving the highest conversion rate in fall 2018. At the same time, the number of courses taken and completed by Open Learning students remained stable over the last four years. It appears that moderate challenges exist with regard to domestic student application generation.

Table 1. TRU SEM Funnel Trends Dashboard (Domestic Students), fall 2011-fall 2018

<table>
<thead>
<tr>
<th></th>
<th>Fall 2011</th>
<th>Fall 2012</th>
<th>Fall 2013</th>
<th>Fall 2014</th>
<th>Fall 2015</th>
<th>Fall 2016</th>
<th>Fall 2017</th>
<th>Fall 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications</td>
<td>7,933</td>
<td>7,710</td>
<td>8,490</td>
<td>8,231</td>
<td>7,850</td>
<td>9,285</td>
<td>8,113</td>
<td>7,173</td>
</tr>
<tr>
<td>Offer Rate</td>
<td>79%</td>
<td>72%</td>
<td>69%</td>
<td>69%</td>
<td>68%</td>
<td>63%</td>
<td>60%</td>
<td>55%</td>
</tr>
<tr>
<td>Conversion</td>
<td>43%</td>
<td>44%</td>
<td>45%</td>
<td>44%</td>
<td>48%</td>
<td>45%</td>
<td>50%</td>
<td>56%</td>
</tr>
<tr>
<td>Retention Rate</td>
<td>48%</td>
<td>50%</td>
<td>48%</td>
<td>49%</td>
<td>48%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Completion Rate</td>
<td>42%</td>
<td>42%</td>
<td>39%</td>
<td>36%</td>
<td>29%</td>
<td>21%</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

Enrolment of international students tells a different story. The TRU SEM Funnel Trends Dashboard data (see Table 2) for international students shows that applications have varied from a low of 1,748 in fall 2014 to a high of 4,946 in fall 2018 for an average eight-year application total of 2,763, which indicates that the fall 2018 application total was 2,213 students above the eight-year average. Further, the offer rate has declined from a high of 92% in fall 2011 to 64% in fall 2018, while the conversion rate has remained relatively constant. By generating over twice as many applications over the past four years, coupled with a stable conversion rate, TRU has more than doubled its new international student enrollment in a short period.

The retention rate for domestic students is relatively constant, ranging from 48% to 50% and averaging 49% over the past seven years. The retention rate for international students is growing. While it has ranged from 44% to 55% and averaging 49% over the past seven years, it has grown from 47% to 55% in the past three years. Currently, the retention rate for international students is 5% higher than the retention rate for domestic students. The FTE utilisation rate currently stands at 88%.

Populations experiencing retention rates that are lower for open and selective baccalaureate programs include students who earn a lower GPA, who are older, and who enrol less than full-time.

The external environment in BC creates a relatively stable enrolment management environment for BC postsecondary educational institutions. The 2019-2020 budget recently announced by the Government of British Columbia shows a 5.7% increase in post-secondary education funding, which is the biggest increase in a decade. However, when dedicated spending (e.g., employer health tax, set asides for specific initiatives in skills, trades, health and technology) are taken into account, the net effect is a 1.7% increase after inflation.

Moreover, the Federal Government is currently stressing skills development through lifelong

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learning and more work-integrated learning, which are areas of strength for TRU. Some governmental challenges, however, will need to be considered. They include the changing landscape in Ontario related to tuition and financial support for students, the Provincial Government’s continuing support for adult basic education and trades education, and whether the Federal Government’s research priorities will align with TRU’s research areas.

An enrolment management institutional self-audit completed by the TRU SEM Consultation Task Force revealed moderate strength in achieving an institutional culture of partnership and collaboration, including leadership, participation and buy-in; creating a data-rich environment to inform decisions and evaluate strategies; and development of action steps/tactics for implementing enrolment-related strategies. Areas cited for moderate improvement included: develop an enrolment infrastructure sufficient to achieve enrolment targets; enable effective financial planning and generate added net revenue for the institution; and achieve sustainable institutional SEM. Areas identified as needing significant improvement included: align institutional strategic plan with broad enrolment targets and desired mix of students; establish clear five to ten-year Key Enrolment Indicator (KEI) targets for the number and types of students needed to fulfill the institutional mission; and develop strategies for achieving KEI targets and enhancing a successful student admissions funnel system that effectively and efficiently moves a student from prospective status seamlessly to a confirmed enrolment.

This suggests TRU has put its focus on developing solid data ability and implementing operational activities in a culture of partnership and collaboration. To achieve sustainable SEM at TRU, however, will require the University to develop medium and long-term KEIs, develop well-designed enrolment strategies, put in place an effective enrolment infrastructure, and connect institutional financial management decision-making with enrolment planning.

Interviews with staff, faculty, and students over a two-day period in February 2019 yielded several consistent themes regarding TRU’s enrolment management services and activities and how they can be enhanced to increase enrolment, which will be further described in the section headed “Primary Observations”.

**Primary Observations**

1. The students we spoke with were generally positive about their TRU student experience. They described the University as a “stepping stone institution” and one that provides a “personable student experience.” However, some students noted that they struggle to stay informed of TRU’s recruitment and student life opportunities.

2. The current TRU enrolment management organisational structure achieves much of the SEM framework encouraged by AACRAO. It, however, lacks faculty member participation.

3. Enrolment targets are set annually using five-year projections, rather than developing a plan for what TRU’s overall student make-up should be in the future.

4. TRU has compiled significant data to support SEM efforts. The University is committed to using a data-informed approach for developing and evaluating enrolment management strategies.

5. TRU engages in a lot of SEM Activity, but much of it is reactive. The University does not have a clear SEM strategy. There appears to be conflicting views on some key enrolment management topics, including admissions processing, targeted student recruitment, financial aid leveraging, and strategic scholarships.

6. Much more effort has been generated to meet incoming student needs than has been placed on success strategies for current students.

7. The Faculty of Student Development boasts a wide array of support services it provides to TRU students. This is an impressive set of services for a university of TRU’s size.

8. There is a clear delineation between the goals and efforts of campus academic programs and Open Learning’s goals and efforts, specifically around student enrolment prioritizations.
9. While TRU has several student communication plans, it lacks a comprehensive communication plan to reach current students throughout the student lifecycle.

**Primary Recommendations**

1. The University should develop its vision, and corresponding goals, so that departments can set enrolment-related goals consistent with the institution’s SEM goals.

2. University executives should find ways to bridge the systems and governance differences between campus academic programs and Open Learning so that uniquely blended student experiences can occur.

3. TRU should implement systematic communications to promote enrolment and student life information to students. The procurement of a CRM is part of this solution, but creation of a workflow and timeline will also be necessary.

4. TRU should identify at-risk student populations and deploy supports to enhance their academic performance.

5. Move advising of current students from Enrolment Services to the Faculty of Student Development where this work can be better connected with the University’s student success initiatives. Future student’s admission counseling should remain in Enrolment Services.

6. Review existing communication plans to ensure that student communications are well developed and support students throughout the student lifecycle.

7. Develop medium and long-term international student enrolment strategies that build on the recent near-future strategies. This should include a plan to increase international student country of origin diversity.

8. Ensure that institutional financial aid is directly connected to enrolment management goals. This could include making earlier awards and making scholarship awards strategic.
9. Use enrolment data to develop a narrative description of key enrolment issues that can be used as inputs into the development of the SEM plan and for gaining increased enrolment management buy-in across campus.

10. Conduct student outcomes analyses to determine the success of different student populations (e.g., open enrolment programs, first-generation students, low academic-performing students, deferred enrolment). Emphasis should be placed on targeting students most likely to succeed.

11. Put more focus on recruitment strategies for the recruitment of area high school graduates who do not go directly to post-secondary education from high school.

**Application of SEM Best Practices in TRU Enrolment Management Departments**

**Observations**

**Organisational Structure**

Placement of enrolment management within the academic framework has been present in the research literature since the early 1990s. Dolence described SEM as a “comprehensive process designed to help an institution achieve and maintain the optimum recruitment, retention, and graduation rates of students where ‘optimum’ is defined in the academic context of the institution”.15 Smith went further to suggest, “enrollment management is impossible without strong and lasting relationships with faculty members; they are important to all aspects of enrollment management and essential at key points”.16 Henderson stressed the importance of


developing an enrolment management “ethos” and making structure the “servant rather than the master of enrollment policy and strategy.”

AACRAO supports placing enrolment management within the institution’s academic context. At its annual Strategic Enrollment Management Conference, conference planners have developed the popular SEM Team Experience, which encourages institutions to bring members of their SEM committee, along with operational enrolment management staff, to the conference in order to enhance collaboration across campus around the important student success agenda. AACRAO has also published various enrolment management-related publications (see Appendix B), and sponsored two leading journals, *Strategic Enrollment Management Quarterly* and *College and University*, which speak to ways institutions can place enrolment management in the academic structure.

To assist institutions, AACRAO has established a SEM organisational framework to support institutions with the development of a way of optimizing enrolment management on their campuses. It goes beyond reporting structures and focuses on the ways institutions can work across reporting structures to achieve institutional and enrolment success. Specifically, it calls for an over-arching SEM steering committee, recruitment and retention councils along with related subcommittees, and a data team. Figure 1 displays the AACRAO-suggested SEM Organisational Framework.

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Figure 1. SEM Organisational Framework (AACRAO Consulting, 2018).

**SEM Organizational Framework**

The current TRU enrolment management organisational structure achieves much of the SEM framework encouraged by AACRAO. The Academic Planning and Priorities Committee, which is chaired by the Provost, appears to be effective in setting academic program enrolment goals and recommending new academic programs. The SEM Consultation Task Force is providing coordination for the development of a draft SEM plan and planning structure. The Recruitment Working Group, which includes a significant number of campus stakeholders, is working to increase recruitment support and collaboration across departments, divisions, and faculties.

The Student Success Committee advises Senate on matters related to student support and service. As it continues to mature its enrolment management effort, the University will need to examine how it can enhance collaboration and cooperation across campus to support institutional and student enrolment success. This will require formalizing the SEM organisational framework and considering ways the institution can work across reporting lines.
to enhance student success, both in terms of marketing and student recruitment, but also in support of student retention and success.

There is limited faculty member involvement in SEM. The deans indicated that faculty involvement is important to the implementation of SEM and encouraged more faculty participation.

The current AVP enrolment services and university registrar is the third person to have responsibility for SEM at TRU. This title has evolved over time and now does not include the word “SEM.” This causes some to wonder who has responsibility for SEM at TRU even though SEM is clearly mentioned in the AVP enrolment services and university registrar’s job description. Institutional Planning and Assessment reports to the vice-president administration and finance.

Operationally, we make the following observations:

⇒ The sharing of finance responsibilities between the provost and vice-president administration and finance creates an important synergy between finance/administration and academic program delivery that is important to achieving sustainable SEM.

⇒ Separate areas of TRU work independent of one another without a larger focus on institution-wide goals. For example, TRU World has its own admissions, recruitment and marketing teams. In addition, Open Learning and On Campus have different registration processes.

⇒ Advising is located within Enrolment Services. With the exception of admissions advising, which is normally based in the registrar’s office, advising is often found organisationally in the student services area where it is aligned with student development and student success. A synergistic opportunity may be lost by placing advising in Enrolment Services.

⇒ There is no current communication plan for spreading the word about SEM across the TRU campus. One is, however, in the early development stages.
Efficiency of Policies and Practices

Enrolment Services support for On Campus and Open Learning have recently been merged to provide consistent and more efficient support for all TRU students. The recent change has left an impression with some who worked with Open Learning that they are no longer able to provide the same level of service to students they once did.

Recent changes in TRU World to manage international student admissions (e.g., expiree dates on conditional offer letters, a deadline to confirm the student has a study permit) have had positive effects on admission-yield efficiency. These were displayed in Table 2.

The Enrolment Services management team members stated that some policies still reflect TRU’s days as a college. It was stated that some policies do not match the needs of a research institution or one with graduate programs. These policies sometimes result in inefficiencies.

On Campus and Open Learning appear to compete rather than complement each other in the area of academic planning and course sequencing. According to conversations with the deans, students are allowed into courses two weeks after they begin, which creates the need to hire instructors late in the process and to create “ghost sections” to accommodate late enrolments. This practice may be creating a specific population with higher than average attrition rates. This was said to be a result of community expectations as an open enrolment institution or because students would have to wait a full year for program admittance if they are not placed in the course during the current term.

Enrolment Services staff stated that the transfer credit team has difficulty keeping up with the workload they have, which may be due to understaffing. This results in slower decisions for other areas. There are several unfilled positions in Enrolment Services. It was not clear, whether these positions will remain unfilled or if they have been eliminated.
Admission policies vary considerably at TRU. Admission to courses and programs offered through Open Learning have no general admission requirements, although prerequisites must be met prior to registering. Developmental education programs do not have general admission requirements. Vocational programs do not have general admission requirements, but they do have program-specific admission requirements. Admission to academic undergraduate programs requires meeting general admission requirements as well as any program-specific requirements. Admission to graduate programs requires satisfying general admission requirements as well as any program-specific admission requirements. There is a perception among students and area guidance counselors that the various admission policies in place at TRU continue to support the community college mission and detract from the University’s research university aspirations.

The English language admission requirement stipulates that applicants must achieve a minimum score of 6.5 on the International English Language Testing Service (IELTS) with no bands below 6.0, or equivalent achievement on an alternative approved English language proficiency assessment. This is the same requirement for both undergraduate and graduate studies. While the 6.5 IELTS standard is consistent with what is seen at comparable Canadian universities for undergraduate admissions, a higher standard is normally used for graduate study admissions.

Admission processing is described as flexible, collaborative, and benefiting from teamwork within the admissions area. Some suggested that the Enrolment Services Office was slow to process applications and that a more streamlined and robust process is needed to enhance competition in the crowded BC higher education landscape. Currently, it can take up to two weeks during peak times to process an application. Some indicated that with more staff, application speed could be increased. In particular, there is interest in adding staff to process transcripts to achieve more transcript analysis efficiency.
Communications with Students, Including Marketing

Marketing was a frequent discussion topic throughout the campus interview group discussions. Some of the most common marketing themes include:

- Explore ways to enhance TRU awareness in the Lower Mainland region;
- Conduct more market and institutional research and make better use of analytics to ensure that limited funding is spent effectively;
- Develop consistent branding and marketing across the University;
- Continue web site improvements;
- Develop strategic marketing within selected market areas (e.g., Lower Mainland, Calgary);
- Increase the number of touch points throughout the student recruitment and enrolment process; and
- Make the Admissions website easier to navigate.

The Marketing and Communications team covers a wide array of functionalities, including communications and social media, brand and marketing, creative design, web strategies and internal communications. It functions in four integrated practice areas: creative and design; web and online communications; social media and media relations; and strategic planning and project management. Marketing and Communications has a five-year strategic plan, which focuses on enrolment, reputation, and collaboration. The plan includes enrolment goals, which ultimately will be aligned with SEM goals. It is supported by subsidiary operational plans. Marketing recently completed a brand model. Marketing and Communications has a strong working relationship with the Future Students Office. One outcome of this relationship is the new offer package, which is a welcome addition to the admission-yield process. The associate vice-president marketing and communications reports directly to the President of TRU.

TRU has various communications plans outside of the plan overseen by the Future Students Office, which is focused on domestic students. The Open Degree Program communications flow is comprehensive with telephone, email, and advising touch-points throughout the student enrolment cycle. TRU World maintains a communication plan for new international students. The Faculty of Student Development has a communications matrix that speaks to various points along the student experience cycle. We did not, however, observe a seamless flow of communication throughout the student experience.

**Recommendations**

It is recommended that TRU better clarify what enrolment management is, and what it is not, at the university. This includes the development of common vocabulary and structures around enrolment initiatives for all areas. The goal is for everyone involved in enrolment activity at the university to better understand his or her role.

The current organizational structure, which has Enrolment Services reporting through the AVP enrolment services and university registrar to the provost, works for enrolment transactional purposes. However, greater faculty involvement is required to support program alignment with enrolment management goals. Each reporting area’s enrolment goals need to tie to those of the University.

It is recommended that advising of current students move from Enrolment Services to the Faculty of Student Development where it can be better connected with the University’s student success initiatives. Future Student’s admission counseling should remain in Enrolment Services.

A review of the recruitment-working group’s size is necessary to ensure it is appropriate to the task of coordinating recruitment and communication strategies across the campus. It is also necessary to review staffing in Enrolment Services to ensure that adequate staff are in place to manage workflow, especially in application processing and transfer evaluations.
A review of current enrolment policies is necessary to determine if the needs for all student types are being addressed. This includes a comprehensive analysis of students allowed to register for courses after the semester begins. Another specific analysis to be performed includes an evaluation of the English language admission requirement for graduate studies to ensure that it is meeting the needs of graduate study at TRU.

An institutional marketing plan that connects to the other major plans (e.g., strategic plan, academic plan, SEM plan) is needed. This includes the review of existing communication plans to ensure student communications are well developed and support students throughout the entire student lifecycle.

Communications with the institution’s educational community throughout the SEM planning process is considered a SEM best practice. TRU has begun development of a communications strategy. We recommend that it be fully developed and implemented throughout the SEM planning project.

**How the Application of SEM is Impacting Enrolment of New/Potential Students**

**Observations**

Current enrolment targets for different student populations are set by using previous years’ trends and five-year project data. Little focus is given to what the make-up of TRU’s student body should be in years to come.

The number of domestic recruiters has increased from two to nine over the past few years, yet domestic enrolment has remained flat. The recent Academica Group report\(^{19}\) indicates that the number of applicants coming directly from high school dropped from 78% to 59% between 2011 and 2018. Applicant growth was reported for incomplete college/university/polytechnic,

college certificate/diploma/degree and university undergraduate degree. Potential exists to reallocate positions to other areas experiencing enrolment challenges.

International student enrolment has become an important part of the University’s approach to enrolment management. International students represent approximately 16% of the overall enrolment. The University plans to expand international student recruitment in underrepresented countries while managing international recruitment overall at current levels. TRU World uses six focus areas, including marketing, recruitment, international student services, international mobility, transnational education services, and international training. TRU has developed important educational partnerships and runs its own language institute. The TRU World international strategy is highly centralized, with most key enrolment services provided to international students by TRU World. Current strategies are focused on the near future. Nearly two-thirds of TRU’s international students are from two countries – India (47.1%) and China (17.3%). The growth in Indian applications is tied to the loosening of the India visa process. The next highest representation is Bangladesh with just 3.8%. An opportunity exists to increase the diversity of countries within the international student cohort.

Many staff and faculty (and some students) discussed the University’s institutional identity. Some suggested the institution should speak more forthrightly about “who we are.” Others thought there should also be clarity in terms of “what we are not.” Most of the faculty and staff we spoke with were uncertain about the University’s mission.

The University does not have a clear SEM strategy. There appear to be conflicting views on some key enrolment management topics, including admissions processing, targeted student recruitment, financial aid leveraging, and strategic scholarships.
TRU offers scholarships and bursaries for newly admitted students. These awards, however, are not considered strategic. A recent Academica Group report\textsuperscript{20} found that guidance counselors at regional high schools indicated, “despite the increasing number of scholarships, it is increasingly difficult to secure scholarship funds.”

**Recommendations**

The University needs to evaluate the outcomes provided by recently adding seven additional domestic recruiters. Consider allocating one or more of these recruiters to developing prospective student market segments.

The university needs to clarify the institutional identity by increasing understanding of the institutional mission, values, and vision. It is necessary to develop medium and long-term international student enrolment strategies that build on current near-future strategies. This should include a plan to increase international student country of origin diversity. Efforts also need to be made to establish a broad understanding of TRU’s mission and vision within the context of the Lower Mainland educational community.

Institutional financial aid should be directly connected to enrolment management goals. This could include making earlier awards and making scholarship awards strategic. Efforts to enhance enrolment management activities—including marketing, student recruitment, and retention— are needed to focus on underserved student populations (e.g., Indigenous students). The University needs to increase diversity within the international students to lessen TRU’s reliance on China and India.

Assessment of the Efficiency and Effectiveness of SEM Services from a Student Perspective

Observations

The students we spoke with were generally positive about their TRU student experience. They described the University as a “stepping stone institution” and one that provides a “personable student experience.” Examples of this include faculty at TRU show personal interest in students, faculty get to know students by name, students often engage with faculty on research projects, and class assignments are often research-based. They also said university life “is not what it could be.” One student said the campus feels “boring due to little university programming.” We heard that students “need to see the personal touch when they get here” and that “service is key.” They especially were concerned about a lack of communication around student life activities.

Some areas where students expressed concern included:

⇒ Affordability: Students expressed concern about educational costs and lack of financial support.

⇒ Commuters: TRU has a stigma as a commuter institution, making it “one step above a college.” Commuter students reported that they feel “isolated,” but by becoming involved in campus life, positive interactions can and do happen.

⇒ Marketing: One student suggested that TRU has a hard time selling itself as a destination university. This message is particularly difficult to communicate to diverse student populations, as TRU has a history of not engaging students from certain geographical locations.

⇒ More enrolment: Several students expressed concern about enrolling an increasing number of students without increasing the amount of resources committed to life on campus.

⇒ Program of study: The student experience seems to vary by program of study, with some academic areas having strong student experiences while others offer fewer student life activities in which to engage. Students reported that the University appears “segregated by program.”

⇒ Registration: Students said that they have had “some issues with getting into courses” they need to graduate on time. Some stated they take online courses only because
there are no on campus courses available to meet their program requirements. They indicated that some programs (e.g., business, computer science) are over-enrolled.

⇒ **Students at-risk**: A common view exists that the University should increase services for certain populations (e.g., First Generation students, Indigenous students). They also felt that the University should be more proactive in reaching out to students at-risk.

⇒ **Student services**: Services are seen as minimal. They indicated that services provided on Student Street were understaffed.

⇒ **Transfer**: Some students attend TRU with the intent of transferring to another university after completing one-to-two years at TRU. A few students reported having challenges with the transfer process related to transfer credit.

⇒ **Website**: The website needs better design and navigation.

The TRU Students’ Union Report on the Student Budget Consultation\textsuperscript{21} identified some areas of excellence including Library services, Study Abroad, and Writing Centre. Areas for improvement were identified as including: academic advising, course offerings, classroom technology, and equipment. In the areas of responsiveness, several areas were mentioned, including Food Services, course materials, Student Awards and Financial Support, and classrooms.

TRU collects a wealth of student satisfaction data. The Canadian University Survey Consortium survey\textsuperscript{22} results indicated that while only 54% used academic advising services, 81% were satisfied or very satisfied. The related CUSC Qualitative Analysis Report\textsuperscript{23} found that the most positive experiences mentioned by students are around their “personal relationships they developed on campus, with professors and their skills and teaching ability, and in the relationships they developed with professors” (p. 3). Critical comments focused on Campus


Services and Facilities, including parking, food services, and campus buildings and facilities. We observed similar student comments at comparable campuses.

The Canadian Bureau of International Education Survey\textsuperscript{24} found that TRU was “rated as a top institution for students feeling successful in living in Canadian culture and society.” It indicated high ratings for finding help with questions or problems, satisfaction with library services, understanding information presented in courses, satisfaction with all aspects of Canadian education experience, and performing adequately in written assignments. Lower ratings occurred for institutional support received to settle and integrate children/spouse into the community, staff/students who have shown an interest in my country/culture, housing services, and financial aid services.

The NSSE Survey of First and Fourth Year Baccalaureate Students found that 71\% of first year international student respondents and 84\% of fourth year international respondents indicated that their overall educational experience at TRU was ‘good’ or ‘excellent’.\textsuperscript{25} As reported by the National Survey on Student Engagement, 89\% of first-year students and 88\% of fourth-year Aboriginal students view their overall educational experience as ‘good’ or ‘excellent.’ Responses between Indigenous and domestic non-Indigenous students were similar.

We also spoke with staff that are engaged with the delivery of student services. They described the campus as student-centred with a strong commitment to diversity and inclusion. Several staff pointed out how effective collaboration is across units. Areas of concern voiced include the need to increase resources for student services (e.g., Wellness Centre, Intercultural), and development of more student-mentoring initiatives. Space could be better organised on “Student Street” to enhance and leverage the student experience, and to enhance a sense of


belonging on campus. Some student services have been improved following implementation of several of the Keeling and Associates’ *Review of Student Life Programs and Academic Support Services Report* recommendations.\(^{26}\) No assessment or evaluation has been conducted since these changes have been made.

**Recommendations**

It is recommended that TRU identify which student services need to be enhanced to address student concerns, especially as it relates to capacity and ability to deliver needed services. As a starting point, the consultants recommend addressing those services with the greatest student retention, especially those services that affect first-generation and Indigenous students. An examination of transfer credit practices is necessary to ensure students receive the credit they earned on a timely basis.

More coordinated transfer programs should be developed to encourage prospective students to start at TRU, and to support students who transfer prior to completion. Mechanisms need to be put into place that allow for a review of course availability so that students nearing graduation are assured their needed courses in a timely manner.

A review of available student services is necessary to ensure those offered are consistent with student enrolments. This can be started by reviewing the results of the Keeling report. A reorganization of Student Street is most likely necessary to meet the needs of students’ natural progression through their student journey. Student life programming communications need to be reviewed and centralized so that students know where to turn for information related to what is occurring on campus.

Evaluation of the Use of Electronic/Virtual Student Services and Technology to Support Related Internal Business Processes

Observations

TRU uses many different technologies to support its enrolment management activities. The technologies discussed with the consultants are listed below.

ARGOS: TRU staff have access to a variety of custom-built reports in ARGOS.

Banner: TRU uses Banner 9 as its student information system, with some processing work continuing to be done using Banner 8.

Banner Document Management: TRU uses Banner Document Management to manage scanned documents or electronic documents.

BCCampus: TRU uses BCCampus for transcript exchange purposes. A few BC post-secondary institutions are ready to exchange electronic transcripts with TRU.

Clockwork: Clockwork is a software that is designed to meet the custom needs of various student service departments at TRU. Some features include student data management, appointment scheduling, reporting, test booking, appointment booking, and note taking.

CRM: The consultants understand that the University has been considering the purchase of a CRM and is now engaged in a CRM procurement process. This has been a lengthy process, taking more than two-years. Implementation of a CRM should greatly support both student recruitment and continuing student communications.

Curricunet: Curricunet is used for managing curriculum review and approval. Some indicated that it creates bottlenecks in getting curricular changes approved.
**DegreeWorks**: DegreeWorks is currently used for Open Learning programs and is currently being deployed for all other programs.

**EducationPlanner BC**: Most applications are received through EducationPlanner BC. International students may also apply on a TRU World online application or by completing a paper application.

**Infosilem**: TRU uses four Infosilem products to support scheduling.

**MyTRU**: TRU has a student portal, called MyTRU, which provides a mix of Banner 8 (SSB Application), Banner 9 apps, and custom forms.

**Simplicity Career Services Manager**: This is a software used to connect students to employers. Features include Student CRM, Recruitment Toolkit including posting a system, Career Fair and Workshop Manager, Experiential Learning toolkit for posting co-op and internship positions, metrics, and outcome reporting.

**Tableau**: The dashboard supported by Tableau has been helpful in showing peer benchmarks, and student retention data. When the CRM is fully implemented, it can be used to send specific data to the enrolment managers to help them evaluate and guide strategies.

The University is committed to using a data-informed approach for developing and evaluating enrolment management strategies. The Department of Integrated Planning and Effectiveness (IPE) has generated numerous reports tracking TRU’s enrolment demographics for the past several years. IPE has also integrated Tableau reporting software, making data visuals richer. The collection, maintenance, and accessibility of data seems strong. However, the campus appears to be data rich and information poor. An opportunity exists to interpret data with narrative and visual data presentations to better inform departmental and institutional decisions.
**Recommendations**

It is necessary to increase integration of technology solutions to advance institutional and student enrolment success. A specific example includes moving all student information system work to Banner 9 as soon as practicable. The CRM procurement process needs to be concluded so that a comprehensive communication strategy can begin.

Given the wealth of data available on campus, the next necessary step is to analyze and extract key findings to develop a narrative description of key enrolment issues that can be used as inputs into the development of the SEM plan and for gaining increased enrolment management buy-in across campus. Data generation will need to be prioritized while ensuring that the data provided is used for operational purposes associated with key enrolment management undertakings.

Workflow procedures to support existing data needs to be created along with further narrative detailing the data highlights. An example of workflow to be generated is the completion of an admissions mapping exercise. This can be done by applying the data analytics function in Tableau to admissions data in Banner.

**Evaluation of How Data is Collected, Maintained and Accessed for Use in Making Strategic Enrolment Decisions**

**Observations**

A conversation with TRU leaders led to the question “Why isn’t data being used well?” The response was that there is too much to wade through, and that it requires significant filtering and distilling.

The Department of Integrated Planning and Effectiveness has a strong staff that provides a variety of data assessment and analysis services to the TRU campus. Currently, there are two research and planning analyst vacancies.
The Future Students Office collects much rich student recruitment-activity data. They describe such activities as tours, student meetings and appointments, emails, recruitment travel, and publications distributed. The consultants have not, however, seen any statistical reports that show how inquiries relate to applications, and eventually enrolments.

TRU World described their enrollment planning decisions as being responsive. They are told by institutional leaders what international enrollment is needed to meet budgetary goals. Then the department works to get that enrolment with students representing as diverse a makeup as possible, studying in targeted program areas.

Open Learning described how their integration into TRU required the division to prove its sustainability in three years’ time. This resulted in them working aggressively to build enrollment. In the past few years, Open Learning has lost its academic director position and has done more of its planning based on enrollment histories, rather than utilizing projections.

**Recommendations**

It is recommended that TRU develop statistical reports that show inquiries, applications and enrolments associated with major recruitment goals by recruitment source. Generated reports need to include more narrative to address concern with too much data needing to be filtered and distilled. A review is necessary to determine whether current vacancies in IPE should be filled to ensure support for SEM planning.

**Application of Best Practices in Enrolment Management Strategies**

**Observations**

In order to carry out enrolment strategies effectively, institutions need to develop trust and mutual support between those engaged in developing and implementing enrolment management activities and those who are affected by these activities. We observed some
examples of where trust could be improved. One example is a stronger planning and operations relationship between Enrolment Services and the deans. With a clearer understanding of one another’s issues and concerns, more synergy can develop to improve strategies.

One consideration is to state the key enrolment management process steps and to be clear about who is responsible for each step. AACRAO Consulting has developed the SEM Plan Continuous Improvement Process, displayed in Figure 2.
While the University does not currently have a comprehensive SEM strategy, it has made some decisions lately that will lead to the development of a seamless SEM strategy. This includes the upcoming visioning exercise and academic plan. With clearer focus on what the University aspires to be, SEM will be easier to align in the long term.

Recruitment tactics have been described as being organic and lacking an overall strategy. Domestic student enrolment has decreased over a five-year period, while Open Learning and TRU World enrolments have increased. Multiple groups described this activity as being reactive to current interests and not proactive toward meeting the University’s larger enrolment goals.

The Future Students Office has developed an operationally focused undergraduate student recruitment plan that includes targets and goals for primary points of entry, key strategies,
recruitment activities, and success measurements. The primary plan focus is the recruitment of regional direct entry students that are within the boundaries of TRU’s six local school districts (target: increase applications by 1.5% annually). Other targets include BC transfer students to undergraduate programs (target: increase applications by 3.4% annually), national delayed entry students (target: increase applications by 2.6% annually) and Indigenous students (target: increase applications by 2% annually). While the plan is primarily oriented to recruiting regional direct entry students, we note that it anticipates marginal growth even though the number of recruiters in this region have increased. Moreover, we note that the growth in the other student entry points shows higher application growth while they receive less support from the Future Students Office.

TRU has an Indigenous recruitment strategy\(^{27}\) that is focused primarily on school visits outside of the general recruitment circuit, education and career fairs, and band and educational meetings in selected regions. The strategy is based only minimally on data since it has “little or no data to reference for identifying gaps and determining priority areas.” It includes metrics for various student entry types. Implementation of the recruitment strategy will require strong cooperation between the Future Students Office, Aboriginal Education, and Enrolment Services.

In the recent Academica Group report\(^{28}\), area guidance counsellors suggested that TRU may want to consider some of these recruitment activities: focus on their own activities within the high schools (as opposed to joining the “pack” for post-secondary fairs), develop more lunch hour activities to showcase itself, bring sports exhibition games to high schools, increase partnerships between TRU faculty members and faculty members in the high schools, increase academic advising visits in June, offer opportunities for students to sit in on TRU classes, and improve the viewbook to make it more focused on telling the TRU story and less about admission to the University.


Retention varies across student types, mode of delivery, and academic discipline. Looking at Kamloops campus retention data at the program level, retention varies from 61% (Faculty of Adventure, Culinary Arts & Tourism; Faculty of Arts) to 96% (Faculty of Education & Social Work).\(^{29}\) Retention concerns were expressed for several different student groups (e.g., Open Enrolment programs, first-generation students, low academic-performing students, deferred enrolment). Open-access programs have higher attrition than restricted-entry programs. Research is currently underway to better understand why students dropout prior to completion.

The Faculty of Student Development boasts a wide array of student support services. This is an impressive set of services for a university of TRU’s size. Early Alert appears to be helping to address student attrition by identifying need for support. The 2017-18 Faculty of Student Development annual report identified 53 responses from students connected with the program.\(^{30}\) Staff we interviewed in Student Development commented that while coverage is wide, support is thin, making it difficult to serve students across its service delivery functions.

The University oversees a comprehensive set of student awards and financial aid. This includes $4.6 million in awards from a variety of funding sources, which result in 2,930 awards granted to 2,226 students for an average award of $2,082. Approximately 12% of these awards are made to international students. Nearly one-third of these awards are made to science students. An additional $28 million in government student loans and grants is processed by TRU. Student debt in BC has increased by 54% between 2000 and 2015.\(^{31}\) Students observed that there is need for the University to provide additional financial awards to make TRU more affordable.


Recommendations

The institution’s SEM strategy requires an exercise of clearly mapping out key enrolment management processes and responsibilities to ensure processes are effectively and professionally administered. This will necessitate engaging in change management activities to grow trust and mutual support between those engaged in, and benefitting from, campus enrolment management activities. The current silos that exist (e.g. domestic on-campus, TRU World, Open Learning) prevent a continuity of quality service. An implementation of the SEM process framework (Figure 2), with modifications as appropriate, will support the TRU organisational culture.

It is necessary to assess the effectiveness of regional direct entry recruitment activities to determine if current human and financial resources spent in this area are necessary for reaching the low application growth target. It may be necessary to increase expectations for this market and/or invest more deeply in the other student entry areas. Review the Indigenous Recruitment Strategy for alignment with the SEM plan. Incorporate more data and data analysis in the next edition of the plan. A domestic student recruitment plan that includes recommendations suggested by regional guidance counselors was provided in the recent Academica Group report. Review the plan to determine how implemented strategies have influenced enrolment.

Conduct student outcomes analyses to determine the success of different student populations (e.g., Indigenous students, open enrolment programs, first-generation students, low academic-performing students, deferred enrolment). Emphasis should be placed on strategies targeting students most likely to succeed. Examples of strategies need to include making financial resources available for students who demonstrate financial need and who fit into targeted groups for student success outcomes. Identify student services areas where further support would likely result in improved student retention and student success, especially for at-risk student populations.
Analysis of Enrollment Trends in the TRU Market and in Relation to its Enrollment Goals

**Observations**

Overall, K-12 enrolment in the TRU market area will increase over the next few years. The increase of domestic recruiters should allow stronger relationship building with local school districts in hope of increasing the University’s application yield. For TRU to grow its undergraduate enrolments during the next several years, it will need to enhance, in particular, its recruitment of local students who do not enrol in post-secondary education directly from high school.

Five Year Projection of Course Enrolments\(^2\) shows modest growth (range of 2.5% to 3.7%) for on campus course enrolments and moderate growth (range of 3.9% to 4.4%) of Open Learning campus course enrolments. The enrolment of domestic students is projected to be flat for on campus, with moderate growth (range of 3.7% to 4.3%) in Open Learning courses. International enrolments are projected to grow in both on campus (range of 5.1% to 10%) and Open Learning (range of 5% to 5.9%). International enrolment continues to increase, but heavy reliance is placed on only two countries, India and China. Political issues can quickly influence enrolment from any given country. Consideration will need to be given as to whether more effort should be invested in growing domestic on campus enrolments and/or whether continuing growth should be encouraged for Open Learning and TRU World student enrolments.

TRU does not appear to have conducted a meaningful market analysis in recent years. This is reflected in how the University conducts its marketing and student recruitment efforts. While there is some focus on expanding activities in the Lower Mainland areas, we would not describe

it as systematic or strategic, but rather carrying on the practices that have been done the previous year or years. A market analysis will help the University develop in-demand academic programs. We heard various discussions referring to the way TRU conducts its marketing operations, some of which is reflected in our dialogue of best practice enrolment management strategies above. Themes included:

⇒ The campus has an identity crisis as to who it is and who it would like to be.
⇒ Need focused marketing messages that resonate with the reasons students attend TRU that speak to the range of the students (e.g., traditional, First Generation, transfer, adult learners) who attend.
⇒ Marketing and branding communications should be consistent across the University.

**Recommendations**

It is recommended that TRU conduct a comprehensive market analysis. This includes a review of recruitment strategies for the recruitment of area high school graduates who do not go directly to post-secondary education from high school. Additional efforts need to be made to increase the number of countries in which TRU World focuses its marketing and student recruitment activities to reduce dependence on China and India.

**Evaluation of Current Short-term and Long-term Enrolment Goals and Potential limitations that could Potentially Impede Meeting Enrolment Goals**

**Observations**

**Evaluation of Short-term and Long-term Goals**

The University has done a good job at setting aggregate moderate growth enrolment targets through to 2022-23. Both short- and long-term enrolment goals project flat domestic enrolments and increased international enrolments. On one occasion, projections were not achieved (e.g., last cycle international student enrolment was 3,200 while the projection/goal was 3,400). At some point, the University may have to determine what the correct ratio is
between domestic and international students. Future enrolment projections are based more on trend analysis than on the University’s actual enrolment goals. There is no evidence of TRU’s desired outcome for future enrolment for any student type.

We spoke with many individuals who endorsed the notion of data-informed decision-making and action taken based on those decisions. Others emphasized the need to have both the budget and the enrolment projections “stay close to shifts and changes” to ensure that the University can reach its enrolment goals.

**Recommendations**

Identify and implement a methodology for effectively developing accurate enrolment projections. Develop institutional enrolment targets for different student types, program enrolments, and delivery methods so that each area of the University can develop their own strategies for achievement. A specific example of this includes the establishment of international student enrolment goals aligned with appropriate resources.

**Closing and Next Steps**

Thank you for the opportunity to work with TRU on this project. It is our mission to provide subject matter expertise and to transfer knowledge so that institutions can provide outstanding customer service to students and meet their enrolment goals. This report contains several large scale and mutually dependent changes to policy, practice, and technology. It is recommended that TRU develop a project plan for all of these changes and working group(s) to manage these changes. If needed and preferred, AACRAO Consulting can provide ongoing subject matter expertise to help implement these changes.
Appendix A: Interview Participants

Chris Adam, Dean of Students
Dennis Acreman, Dean, Faculty of Adventure, Culinary Arts and Tourism
Kyri Alves, Manager, Future Students
Aririni, Dean, Faculty of Education and Social Work
Mike Bluhm, Associate Vice-President Enrolment Services and University Registrar
Christine Bovis-Cnossen, Provost and Vice-President Academic
Marjorie Budnikas, Assistant Registrar, Audit and Articulation
Baihua Chadwick, Associate Vice-President International and Chief Executive Officer, TRU World
Dorys Crespin-Mueller, Executive Director, Integrated Planning and Effectiveness
Tom Dickinson, Dean, Faculty of Science
Gordon Down, Manager, Student Awards and Financial Aid
Alison Dunn, Manager Strategic Partnerships, Open Learning
Matthew Dyck, Manager Program Delivery, Open Learning
Enrolment Services Staff (group of staff members)
Susan Forseille, Director PLAR, Open Learning
Kathy Gaynor, University Librarian
Lucille Gnanasihamany, Associate Vice-President, Marketing and Communications
Kristin Hamilton, Manager, Integrated Planning and Effectiveness
Andrea Hall, SEM Project Manager
Marion Hannaford, Associate Registrar, Student Systems
Cindy James, Chair of Counselling, Academic Supports & Assessment and Assessment Centre Coordinator
Linda Komori, Creative Manager, Marketing & Communications
Brian Lamb, Director Learning Technology & Innovation, Open Learning
Sarah Langlois, Associate Director Program Delivery, Open Learning
Heidi Lawson, Associate Registrar, Records
Lucas Maikapar, Associate Director, TRU World
Jason Maxwell, Associate Registrar, Admissions
Rick McCutcheon, Dean, Faculty of Arts
Alex McLellan, University Governance Coordinator, TRUSU (and group of students)
Matt Milovick, Vice-President Administration and Finance
Brad Morse, Dean, Faculty of Law
Donna Murnaghan, Dean, School of Nursing
Jan O’Brien, Associate Director, Integrated Planning and Effectiveness
Don Poirier, Associate Vice-President Open Learning
Baldev Pooni, Dean, School of Trades and Technology
Jennifer Read, Director Marketing & Brand, Marketing & Communications
Shawn Read, Chair of Career & Experiential Learning Department & BBA Co-operative Education Coordinator, Faculty of Student Development
Matthew Tarzwell, Manager of Web Strategy, Marketing & Communication
Julie Taylor, Manager Student Experience, Faculty of Student Development
Sarah Walz, Director Student Access & Supports, Faculty of Student Development
Corey Wiwchar, Marketing Manager, Marketing & Communication
Sara Wolfe, Assistant Dean of Students, Faculty of Student Development
Appendix B: Resources


