

American Association of Collegiate Registrars and Admissions Officers
Minutes of the Meeting of the Board of Directors
July 29, 2008

Board Members in Attendance: Paul Aucoin, Mary Baxton, Sam Conte, Nora McLaughlin, Glenn Munson, Wanda Simpson Munson, Michele Sandlin, Jeffrey von Munkwitz-Smith, Paul Wiley

Staff Members in Attendance: Matt Ogle, Jerome Sullivan

Call to Order

President Wiley called the meeting to order at 1:08 p.m. Central Time.

Minutes

MOTION 2008.7.01 – It was duly moved and seconded that the minutes from the meeting of the Board of Directors on March 22, 2008, be approved. ADOPTED

Reports of Standing Committees

Finance & Investments Committee

MOTION 2008.7.02 – It was duly moved and seconded that the Charter of the Finance & Investments Committee be approved as submitted. ADOPTED

MOTION 2008.7.03 – It was duly moved and seconded that the Association Travel Policy Draft be referred back to the Finance & Investments Committee to review for exceptions. ADOPTED

Compensation Committee

MOTION 2008.7.04 – It was duly moved and seconded that the Charter of the Compensation Committee be approved as submitted. ADOPTED

Audit Committee

MOTION 2008.7.05 – It was duly moved and seconded that the Charter of the Audit Committee be approved as submitted. ADOPTED

Governance Committee

MOTION 2008.7.06 – It was duly moved and seconded that the Charter of the Governance Committee be approved as submitted. ADOPTED

Program Review & Development Committee

MOTION 2008.7.07 – It was duly moved and seconded that the Charter of the Program Review & Development Committee be approved as submitted. ADOPTED

Strategic Planning Committee

MOTION 2008.7.08 – It was duly moved and seconded that the Charter of the Strategic Planning Committee be approved as submitted. ADOPTED

President Wiley ordered the charters of the standing committees (Finance & Investments, Compensation, Audit, Governance, Programs Review & Development, and Strategic Planning) to be filed.

Reports of Officers

Report of President-Elect

MOTION 2008.7.09 – It was duly moved and seconded that Recommendation #2 from the 2008-2009 Program Committee be referred to the Governance Committee for review. ADOPTED

MOTION 2008.7.10 – It was duly moved and seconded that Recommendation #3 from the 2008-2009 Program Committee be referred to the Governance Committee for review. ADOPTED

MOTION 2008.7.11 – It was duly moved and seconded to appoint Paul Kyle as Vice Chair of the 2008-2009 Program Committee. ADOPTED

President Wiley ordered the written reports of the officers to be filed.

Executive Director Report

Executive Director Sullivan presented a review of the highlights of his written report. President Wiley ordered the report to be filed.

Unfinished Business

There were no unfinished business items to be discussed.

New Business

MOTION 2008.7.12 – Duly moved and seconded that a focus of the October Board of Directors meeting should be strategic planning. ADOPTED

Executive Session

The Board of Directors met in executive session.

Adjournment

MOTION 2008.7.13 – It was duly moved and seconded that the Board of Directors meeting be adjourned. ADOPTED

The Board of Directors meeting adjourned at 5:24 p.m. Central Time.

Attachments

Board of Director Meeting Minutes, March 2008
Finance & Investments Committee Charter
Compensation Committee Charter
Audit Committee Charter
Governance Committee Charter
Program Review & Development Committee Charter
Strategic Planning Committee Charter
2008-2009 Program Committee Recommendations
Board of Directors Financial Update, June 2008
Executive Director Report

American Association of Collegiate Registrars and Admissions Officers
Minutes of the Meeting of the Board of Directors
March 22, 2008

Board Members in Attendance: Paul Aucoin, Mary Baxton, Jerry Bracken, Sam Conte, Dan Garcia, Nora McLaughlin, Glenn Munson, Angé Peterson, Wanda Simpson, Paul Wiley

Staff Members in Attendance: Janie Barnett, Barmak Nassirian, Matt Ogle, Jeff Petrucci, Jerome Sullivan

Board Nominees in Attendance

Adrienne McDay, Michele Sandlin, Jeffrey von Munkwitz-Smith

Call to Order

President Aucoin called the meeting to order at 1:34 p.m. EST.

Minutes

MOTION 2008.3.01 – It was duly moved and seconded that the minutes from the meeting of the Board of Directors on February 20, 2008, be approved. ADOPTED

Reports of Officers

President Aucoin ordered the written reports of the officers to be filed.

Reports Standing Committees

President Aucoin ordered the written reports of the standing committees (Administration and Finance, Association Issues, and Professional Issues) to be filed.

Executive Director Report

Executive Director Sullivan began a review of the highlights of his written report.

Recess

President Aucoin declared the Board meeting to be in recess.

Reconvene

The Board reconvened at 2:34 EST.

Executive Director Report (continued)

Executive Director Sullivan completed reviewing the highlights of his written report. President Aucoin ordered the report filed.

Budget and Finance Report

Vice President for Finance Conte reviewed highlights of the financial update for January 2008. President Aucoin ordered the report filed.

Unfinished Business

The Board reviewed the staff retirement plan.

MOTION 2008.3.02 – It was duly moved and seconded that the AACRAO Board of Directors approve the revised staff retirement plan. ADOPTED

The Board reviewed and updated its list of action items.

New Business

President Aucoin reported that the members of the Task Force on Ethics and Conflict of Interest were appointed. The members are: Dennis Hicks, Indiana University East (chair); Mike Allen, University of Texas at Austin; Tim Amyx, Volunteer State Community College; Elliott Baker, Slippery Rock University; Michelle Forbes, Louisiana State University Law School; Polly Griffin, Princeton University; Betty Huff, University of California – Santa Barbara; and Art Leak, Anderson University. In addition, Marty Taylor from Global Ethics will serve as a consultant to the Task Force and the following people will serve as ex-officio representatives: Paul Aucoin, Jerry Sullivan, and Matt Ogle.

President-Elect Wiley led a discussion of the self-evaluation instrument obtained through BoardSource that will be used as the Board examines its governing role and responsibilities

MOTION 2008.3.03 – It was duly moved and seconded that the AACRAO Board of Directors engage consultant Berit Lakey through BoardSource to assist the Board in interpreting the results of the upcoming assessment process, and in identifying best practices in non-profit board governance that are consistent with AACRAO's Constitution and Bylaws. ADOPTED

MOTION 2008.3.04 – It was duly moved and seconded that the AACRAO Board of Directors augment the Program Committee with one Board-appointed member to serve a two-year term, the first as Vice-Chair and the second as Chair. ADOPTED

Adjournment

MOTION 2008.3.05 – It was duly moved and seconded that the Board of Directors meeting be adjourned. ADOPTED

The Board of Directors meeting adjourned at 3:41 p.m. EST.

Attachments

Board of Director Meeting Minutes, February, 2008
Administration and Finance Committee Report
Association Issues Committee Report
Professional Issues Committee Report
Board of Directors Financial Update, January 2008
Executive Director Report

FINANCE AND INVESTMENTS COMMITTEE CHARTER

DRAFT 7/14/2008

Purpose

The Finance and Investments Committee shall assist the Board of Directors in fulfilling its oversight responsibilities relating to the fiscal health of the Association.

Membership

The committee shall be composed of three or more board members appointed annually by the board chair, and shall be chaired by the Vice-President for Finance. Members of the Finance and Investment Committee shall not contemporaneously serve on the Board's Audit or Compensation Committees.

Meetings

The committee shall meet four times annually, or more frequently as it shall determine is necessary to carry out its duties and responsibilities. The chair will schedule regular meetings; additional meetings may be held at the request of a majority of Finance and Investments Committee members or the board chair.

Duties and Responsibilities

In carrying out its oversight responsibilities, the committee shall

1. Recommend AACRAO's yearly budget to the Board of Directors
2. Oversee AACRAO's financial planning
3. Ensure the preparation of accurate and timely financial reports, and review such reports with the Board
4. Review internal financial controls
5. Review budgets of special projects or committees as appropriate
6. Review, on an annual basis, the sources of funding for the association
7. Supervise the overall implementation of AACRAO's investment policies by the Executive Director and outside investment professionals
8. Recommend the selection, hiring, and termination of all outside financial advisors and other outside investment professionals to the Board of Directors for its approval
9. Recommend the establishment of investment guidelines and policies to the Board of Directors for its approval
10. Review and evaluate the performance of the investment portfolio and financial advisors and other outside investment professionals at least once per fiscal year to assure adherence to policy guidelines, and monitor progress toward achieving investment objectives, and report the results of such reviews and evaluations to the Board
11. Provide overall supervision to the Executive Director to whom the Committee delegates specific duties related to AACRAO investments
12. Act in accord with the association's investment policy and all applicable laws and state and federal regulations that apply to nonprofit agencies including, but not limited to, the Uniform Prudent Investors Act of 1994 and the Uniform Management of Institutional Funds Act
13. Ensure that the association is adequately insured

14. Annually review the committee's own performance, and report the results of such review to the board.
15. The Committee will regularly report on its activities and actions to the Board of Directors, as appropriate. The Committee will maintain minutes of meetings and report to the Board of Directors the results of committee meetings.
16. Annually review and reassess the adequacy of this charter and recommend any proposed changes to the Board of Directors.
17. Perform such other duties as are necessary or appropriate to further the Committee's purposes or as the Board of Directors may from time to time assign to it.

COMPENSATION COMMITTEE CHARTER

DRAFT 7/22/2008

Purpose

The Compensation Committee shall assist the Board of Directors in fulfilling its oversight responsibilities relating to the compensation and benefits of the Executive Director and other executive officers; and shall provide recommendations regarding management successors.

Membership

The committee shall be composed of three or more board members appointed annually by the board chair who shall designate the committee chair.

Meetings

The committee shall meet four times annually, or more frequently as it shall determine is necessary to carry out its duties and responsibilities. The chair will schedule regular meetings; additional meetings may be held at the request of a majority of Compensation Committee members or the board chair.

Duties and Responsibilities

In carrying out its oversight responsibilities, the committee shall

1. Develop a compensation philosophy and compensation policies for approval by the Board of Directors.
2. Review and recommend goals and objectives relevant to the compensation of the Executive Director and other senior managers for approval by the Board of Directors.
3. Annually evaluate the chief executive's performance in light of these goals and objectives, and make a recommendation to the Board of Directors with respect to the Executive Director's compensation.
4. Annually review with the Executive Director the performance goals and objectives for all senior managers, and review and recommend for approval by the board the salaries of the other senior managers.
5. Annually review the staff salaries with the Executive Director to ensure that such salaries are appropriate and consistent with published compensation surveys or reports prepared for the committee by outside consultants.
6. The committee shall have authority to retain and terminate any compensation consultant and shall have authority to approve the consultant's fees and other retention terms.
7. Review all proposed employment contracts and severance agreements with the Executive Director for other senior managers and make recommendations for approval by the board.
8. Oversee the administration of AACRAO's compensation and benefits program, including a review of deferred compensation of current and former senior managers.
9. Develop succession plans for the positions of Executive Director and other senior managers, and submit such plans to the Board of Directors for approval. The

committee is responsible for conducting a search for the executive director, evaluating candidates, and making recommendations to the Board of Directors. The committee recommends the engagement of a professional search firm to the Board of Directors, if such a firm is to be used. Reviews AACRAO's succession plans annually and recommends changes to the Board of Directors.

10. The Committee will regularly report on its activities and actions to the Board of Directors, as appropriate. The Committee will maintain minutes of meetings and report to the Board of Directors the results of committee meetings.
11. Conduct a triennial review of the Committee's own performance, and report the results of such review to the Board of Directors.
12. Annually review and reassess the adequacy of this charter and recommend any proposed changes to the Board of Directors.
13. Perform such other duties required by law or otherwise as are necessary or appropriate to further the Committee's purposes or as the Board of Directors may from time to time assign to it.

AUDIT COMMITTEE CHARTER

DRAFT 7/23/2008

Purpose

The Audit Committee shall assist the Board of Directors in fulfilling its oversight responsibilities relating to the integrity of the accounting and financial reporting; financial controls; compliance with legal and regulatory requirements, including the filing of IRS form 990; and the qualifications, independence, and performance of the outside auditor's qualifications, independence, and performance.

Membership

The committee shall be composed of three or more board members appointed annually by the board chair and confirmed by the Board, none of whom shall receive, directly or indirectly, any consulting, advisory, or other compensatory fees from AACRAO. In addition, there shall be one member-at-large appointed from the voting membership by the Board for a two year term. Members of the audit committee shall not serve contemporaneously on AACRAO's Finance and Investment or Compensation committees. The president shall designate the committee chair.

Meetings

The committee shall meet two times annually, or more frequently as it shall determine is necessary to carry out its duties and responsibilities. The chair will schedule regular meetings; additional meetings may be held at the request of a majority of Audit Committee members or the board chair.

Duties and Responsibilities

In carrying out its duties, the committee shall:

1. Be directly responsible for the appointment, compensation, oversight, and termination of the independent auditor. The auditor will report to the Audit Committee, which will receive and consider all required communications from the auditors and will act as liaison with the Board of Directors.
2. With regard to auditor independence,
 - a. Consider at least annually the independence of the outside auditor, taking into account the auditor's performance of any non-audit services, and obtain and review a report from the auditor describing any relationships between the auditor and AACRAO, the provision of non-audit services, or any other relationships that may adversely affect the independence of the auditor;
 - b. Ensure that non-audit services are not provided to AACRAO by the auditor without committee approval; and,
 - c. Without regard to performance of the auditor, review every three years the desirability of changing audit firms, and require, in any event, that the auditor be changed every five years.
3. With regard to AACRAO's financial statements,
 - a. Review and discuss with management and the auditor the audited financial

statements of AACRAO including, but not limited to:

- i. The auditor's judgment as to the quality of AACRAO's accounting principles and underlying estimates, including significant financial reporting issues or adjustments and judgments made in connection with the preparation of the financial statements;
 - ii. All critical accounting policies and practices used within AACRAO and any discussions with management about such policies and practices;
 - iii. Any schedules of unadjusted differences from the audit;
 - iv. The timeliness and quality of initial drafts of financial statements;
 - v. The continued appropriateness of accounting principles or practices and their consistency with non-profit norms;
 - vi. Management representation letters and other substantive correspondence between management and the auditor;
 - b. Report to the board the completion of the review of the annual financial statements and any related significant discussion;
 - c. Understand that it is not the committee's duty to plan or conduct audits or to determine that AACRAO's financial statements are complete, accurate, and in accordance with generally accepted accounting principles. Management is responsible for the preparation, presentation, and integrity of AACRAO's financial statements and for the appropriateness of the accounting principles and reporting policies used by AACRAO. The independent auditors are responsible for auditing AACRAO's financial statements.
4. With regard to internal controls, review periodically with management and, if deemed necessary, with the auditors, the adequacy and effectiveness of AACRAO's internal controls, including any significant deficiencies in internal controls and significant changes in such controls reported to the committee by the auditor or management.
5. Receive and consider communications from the auditors as to:
- a. Any serious difficulties encountered in dealing with management affecting the performance of the audit, and/or
 - b. Any instance of fraud or illegal acts of which the independent auditors are aware.
6. With regard to regulatory matters,
- a. Review procedures to ensure compliance with tax law pertaining to AACRAO's tax status, including payout requirements,

- b. Review a written communication from the chief executive and senior financial staff member that they have reviewed the Form 990 tax filing, confirming that the form does not contain any untrue statements or omit any material facts, that the financial information presented fairly represents AACRAO's financial condition for the period covered, that it was filed in a timely manner, and that they are maintaining internal controls designed to ensure that material information related to AACRAO's tax filing be made known to them
 - c. Review a written communication from the chief executive and senior financial staff member confirming that they have, to their knowledge, ensured that AACRAO has complied in all material respects with the requirements and prohibitions in its governing documents and articles of incorporation; and
 - d. Obtain regular updates from the chief executive and senior financial staff member and AACRAO's legal counsel regarding compliance matters (including systems for monitoring compliance with laws and regulations, management's investigations and follow-up, and findings of any regulatory agency) and verification that all regulatory compliance matters have been considered in the preparation of the financial statements.
- 7. Review annually AACRAO's conflict-of-interest policies and make recommendations to the board for change, if appropriate, and to review procedures to ensure compliance with AACRAO's conflict-of-interest policies as well as any violations or exceptions.
 - 8. Review and approve a formal confidential process that allows employees to report any inappropriateness within AACRAO's financial management, and that prevents retaliation against employees or others for any such reports.
 - 9. Propose additional duties and responsibilities of the Committee that, in addition to the general tasks and responsibilities, will contribute most effectively to the purposes of the committee.
 - 10. Report regularly on its activities and actions to the Board of Directors, as appropriate. The Committee will maintain minutes of meetings and report to the Board of Directors the results of committee meetings.
 - 11. Conduct an annual review the Committee's own performance, and report the results of such review to the Board of Directors.
 - 12. Review and reassess annually the adequacy of this charter and recommend any proposed changes to the Board of Directors.
 - 13. Perform such other duties required by law or otherwise as are necessary or appropriate to further the Committee's purposes or as the Board of Directors may from time to time assign to it.

GOVERNANCE COMMITTEE CHARTER

DRAFT 7/23/08

Purpose

The Governance Committee is responsible for ongoing review and recommendations to enhance the effectiveness of the AACRAO Board of Directors, including but not limited to assessments, orientation, policies, procedures, handbooks, and committee structure and development.

Membership

The committee shall be composed of three or more board members appointed annually by the board chair, who shall designate the committee chair.

Meetings

The committee shall meet four times annually, or more frequently as it shall determine is necessary to carry out its duties and responsibilities. The chair will schedule regular meetings; additional meetings may be held at the request of a majority of Governance Committee members or the board chair.

Duties and Responsibilities

In carrying out its responsibilities, the committee shall

1. Lead the periodic assessment of the board's performance; and propose, as appropriate, changes in board structure, board committee structure, board roles, and board responsibilities.
2. Regularly assess the effectiveness of board meetings.
3. Regularly review and update the board's handbook, policies, procedures, guidelines, and practices.
4. Design and oversee a process of board orientation, including information prior to election as a board member and information needed during the first cycle of board activity for new board members.
5. Design and implement an ongoing program of board information and education for all board members.
6. Provide ongoing counsel to the board chair on steps that might be taken to enhance board effectiveness.
7. Develop and propose a profile of the board as it should evolve over time.
8. Report regularly to the Board of Directors on the committee's activities and actions, as appropriate. The committee will maintain minutes of meetings and report to the board the results of committee meetings.
9. Conduct a triennial review the Committee's own performance, and report the results of such review to the Board of Directors.
10. Annually review and reassess the adequacy of this charter and recommend any proposed changes to the Board of Directors.

11. Perform such other duties as are necessary or appropriate to further the Committee's purposes or as the Board of Directors may from time to time assign to it.

PROGRAM REVIEW AND DEVELOPMENT COMMITTEE CHARTER

DRAFT 6/25/2008

Purpose

The Program Review and Development Committee shall assist the Board of Directors in fulfilling its oversight responsibilities relating to the scope, quality, effectiveness, and efficacy of AACRAO programs and services provided to its members and the public, including but not limited to publications, communications, conferences, training, educational programs, and AACRAO business entities.

Membership

The committee shall be composed of three or more board members appointed annually by the board chair / the board. The president / the board shall designate the committee chair.

Meetings

The committee shall meet four times annually, or more frequently as it shall determine is necessary to carry out its duties and responsibilities. The chair will schedule regular meetings; additional meetings may be held at the request of a majority of Program Review and Development Committee members or the board chair.

Duties and Responsibilities

In carrying out its oversight responsibilities, the committee shall:

1. Regularly review and evaluate all services and products provided by AACRAO. The reviews and evaluations should consider responsiveness to member needs, scope, quality, effectiveness, efficacy, delivery systems, and viability.
2. Review and recommend goals and objectives for AACRAO programs and services.
3. Consider and recommend to the Board of Directors the additions, consolidation, or elimination of programs and services to meet changing and diverse needs.
4. Regularly assess programmatic needs of the membership and the higher education community.
5. Report regularly to the Board of Directors on the committee's activities and actions, as appropriate. The committee will maintain minutes of meetings and report to the board the results of committee meetings.
6. Annually review the committee's own performance, and report the results of such review to the board.
7. Annually review and reassess the adequacy of this charter and recommend any proposed changes to the Board of Directors.
8. Perform such other duties as are necessary or appropriate to further the Committee's purposes or as the Board of Directors may from time to time assign to it.

STRATEGIC PLANNING COMMITTEE CHARTER

DRAFT 7/24/2008

Purpose

The Strategic Planning Committee shall assist the Board of Directors in fulfilling its responsibilities to develop and monitor AACRAO's strategic plan. The Committee promotes, coordinates, and oversees planning across the Association, and attempts to link AACRAO's programs and services with its mission, markets, and resources.

Membership

The committee shall be composed of three or more board members appointed annually by the board chair, with the consent of the board. The president shall designate the committee chair with the consent of the board.

Meetings

The committee shall meet three times annually, or more frequently as it shall determine is necessary to carry out its duties and responsibilities. The chair will schedule regular meetings; additional meetings may be held at the request of a majority of Strategic Planning Committee members or the board chair.

Duties and Responsibilities

In carrying out its responsibilities, the committee shall

1. Assist the Board of Directors in formulating, advancing, and communicating a vision for the future of AACRAO.
2. Review and recommend to the Board of Directors appropriate mechanisms for developing and implementing the Association's strategic plan.
3. Ascertain the need for outside planning expertise and recommend the engagement of planning consultants to the Board of Directors.
4. Assist the Board Chair in planning and implementing strategic planning sessions and retreats.
5. Identify strategic issues and options through ongoing analysis of AACRAO's internal strengths and weaknesses in relation to its external opportunities and threats.
6. Prepare and periodically update planning assumptions.
7. Coordinate the work of other groups involved in planning and integrate their products into a coherent set of action plans.
8. Monitor the implementation of plans to ensure that they are carried out.
9. Promote and evaluate the continuous assessment and benchmarking of planning efforts.
10. Ensure adequate communication and consultation about planning issues and process with AACRAO's stakeholders.
11. Report regularly on its activities and actions to the Board of Directors, as appropriate. The Committee will maintain minutes of meetings and report to the Board of Directors the results of committee meetings.

12. Conduct an annual review the Committee's own performance, and report the results of such review to the Board of Directors.
13. Annually review and reassess the adequacy of this charter and recommend any proposed changes to the Board of Directors.
14. Perform such other duties required by law or otherwise as are necessary or appropriate to further the Committee's purposes or as the Board of Directors may from time to time assign to it.

**Recommendations to the AACRAO Board of Directors
from the 2008-2009 Program Committee**

Recommendation 1

The Program Committee recommends that we revise the 2009 annual conference schedule for Thursday, April 16, 2009 as follows:

- a. Delete the two Professional Development Sessions scheduled after the Closing General Session (54 sessions)
- b. Add one of the deleted afternoon sessions in the morning prior to the Business Meeting. This will add back 27 sessions.
- c. Add one additional time slot during each session period (from 26 to 27). This will add back 10 sessions.
- i. The net decrease of session offerings is -16.
- d. Change the times for the Business Meeting and Closing Session and END the general conference with the Closing General Session (12:30 p.m.)

Proposed Schedule

Thursday, April 16, 2009

Professional Development Sessions

8:00 a.m. – 9:00 a.m.

Professional Development Sessions

9:15 a.m. – 10:15 a.m.

AACRAO Business Meeting

10:30 a.m. – 11:30 a.m.

Closing General Session

11:30 a.m. – 12:30 p.m.

Board of Directors Meeting

1:00 p.m. - 5:00 p.m. (with working lunch)

Program Committee Meeting (2009-2010)

5:00 p.m. – 6:00 p.m. (Meet in hotel)

Board of Directors Appreciation Reception

6:00 p.m. – 7:00 p.m.

Rationale: The two sessions scheduled after the Closing General session are not well attended and it is difficult to get presenters and facilitators. The afternoon sessions are viewed as “not choice” times for presentations. Ending the conference at 12:30 p.m. will give members the opportunity to fly out on Thursday. It will also negate the cost of the continental breakfast on Thursday morning which will be a cost savings to AACRAO. This change will also free time for the Board meeting on Thursday afternoon.

Recommendation 2

The Program Committee recommends that the position of the Chair of Evaluations be revised to include Evaluations and PAC committee membership. This expanded position will continue to work with evaluations-- which is mostly labor-intensive during the annual conference-- and will work with the President-elect, Board vice presidents, professional activity chairs, and individual committee member to oversee the PAC membership for the following year.

There is always confusion regarding the roles of the committee members and sometimes there is a communication gap from the vice president, to the program coordinator, to the committee chair, and the committee members. This chair would monitor the terms for chairs and members and make sure that each committee has a **confirmed** chair and 5-7 **confirmed** committee members by the September prior to the December Leadership conference. This chair will also work with the AACRAO office to make sure the website database is accurate and updated and will assist with the development and implementation of a comprehensive communication plan to the PACs throughout the year.

Rationale: In order to provide an outstanding annual conference program, there must be a strong PAC committee structure. The vice presidents are extremely busy and consumed with the governance of the association and the program coordinators already have a heavy load so it is felt that having this co-role for the Evaluations/PAC Membership chair will assure stronger and more effective committees. This expanded role was proposed by Paul Kyle the former Evaluations chair and was confirmed as an acceptable revision by Ben Schears, the current chair. This chair already attends the Leadership conference and the Program Committee meeting so there will be no additional cost to the association for this revision.

Recommendation 3

The Program Committee recommends that committee chairs be appointed for two-year terms and that members be appointed for three-year terms. Should chairs or members not prove to be productive or reliable, then they will be removed from the committee roster.

Rationale: It is felt that the program development process will be greatly enhanced by having more experienced chairs. Although there will be some new chairs each year, there would also be more experienced chairs still on board to assist them.

Recommendation 4

The Program Committee recommends the redefinition of the Distance Education committee in Group III. The current definition is appropriate but needs to be expanded to include diverse and emerging student populations. The new definition would include sessions on new issues in distance/online course delivery and expand the focus on topics to include but not limited to adult learners, military student relations, and other distinctive enrollment populations. The program topics would include: admission and registration issues, recruitment & marketing concepts, Department of Defense (DOD) regulations, VA benefits, non-traditional transfer of credit, dependent educational benefits, accreditation, and focused counseling/advising.

Rationale: Registrars and Admissions Officers at institutions are not often involved with regional or national associations for military educators which are often geared toward administrators of institutions. Having programming on these topics at the annual conference will provide critical information on a national level which is not limited to the scope of state or regional interests.



AACRAO Monthly Financial Update

Highlights | Fiscal Year 2008 | June 2008

Presented: Jerry Sullivan and Samuel Conte

Overview

Total operating expenses for June exceeded revenue by (\$5,425), however, AACRAO's year-to-date operating activities generated revenue in excess of expenses by \$1,042,311.

The Association's investments portfolio resulted in net loss of (\$201,513) for the month and (193,709) for the nine months ending June 30, 2008.

The combined operating and investment activities resulted in a deficit of (\$206,937) for the month and a surplus of \$848,602 for the nine months ending June 30, 2008.

In addition, AACRAO received \$135,000 in bequests during fiscal year 2008.

Financial Position

The following summarizes AACRAO's financial position as of:

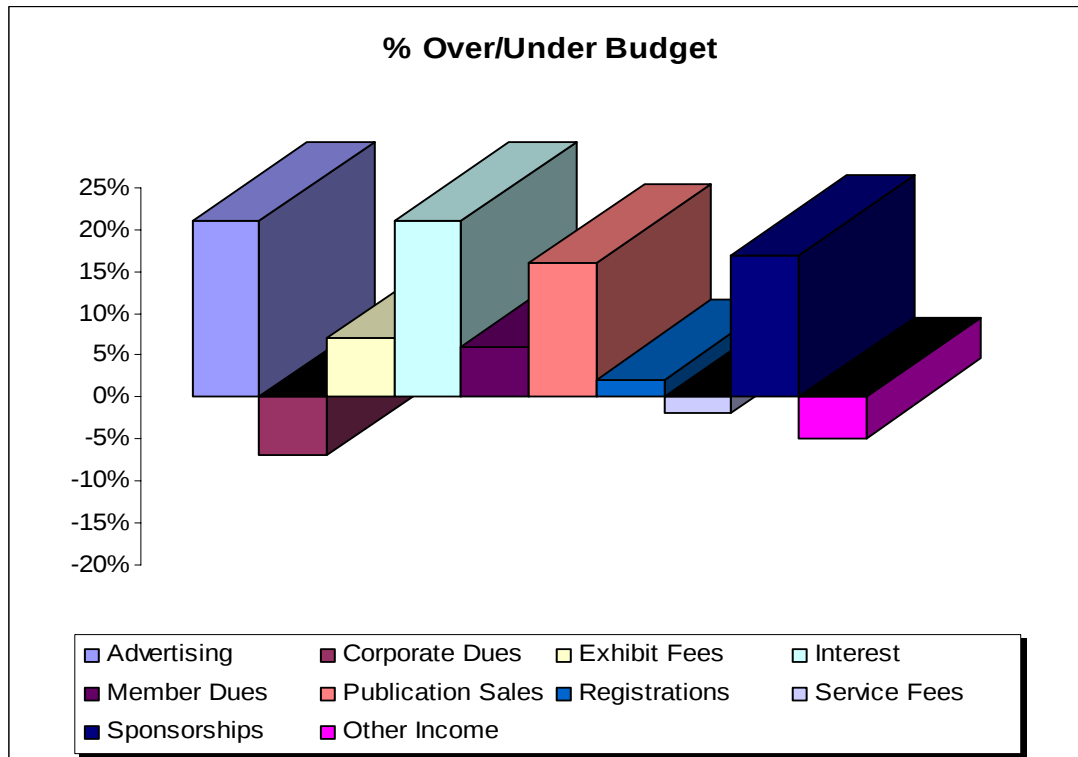
	June 2008	May 2008	Change
Cash	\$803,544	\$392,691	\$410,853
Investments	5,404,478	5,605,314	(200,836)
Accounts Receivable	186,015	199,554	(13,539)
Prepaid Expenses	223,947	169,827	54,120
Total Assets	6,881,913	6,636,574	245,339
Accounts Payable	121,318	103,842	17,476
Unearned Income	1,100,456	665,575	434,881
Total Liabilities	1,529,883	1,077,606	452,277
Net Assets	\$5,352,030	\$5,558,968	(\$206,938)

In terms of accounts analysis, the sharp increase in the cash balance reflects dues collections for the 2008/2009 membership year. The change in investments reflects a substantial decrease in value due to declining market performance. Unearned income increased in June primarily due to the receipt of membership dues for the next membership year.

As a result of the cross over between the dues year (July through June) and the fiscal year (October through September), three months of 2007/2008 dues were recognized in FY 2006/2007 while the other nine months have been recognized in FY 2007/2008. For the 2007/2008 membership year, \$2,322,132 has been collected for membership dues and \$146,165 has been collected for corporate dues. Dues notices for membership year 2008/2009 were mailed in May, 2008. As of June 30, 2008, \$568,892 has been collected for membership dues and \$26,803 has been collected for corporate dues.

Statement of Activities

Revenue: Revenue generated for the nine months totaled \$6,461,909 or 78% of budget (3% above budget expectations.) Seven revenue generating activities exceeded their budget expectations of 75%. All others are either at or fell below expectations:

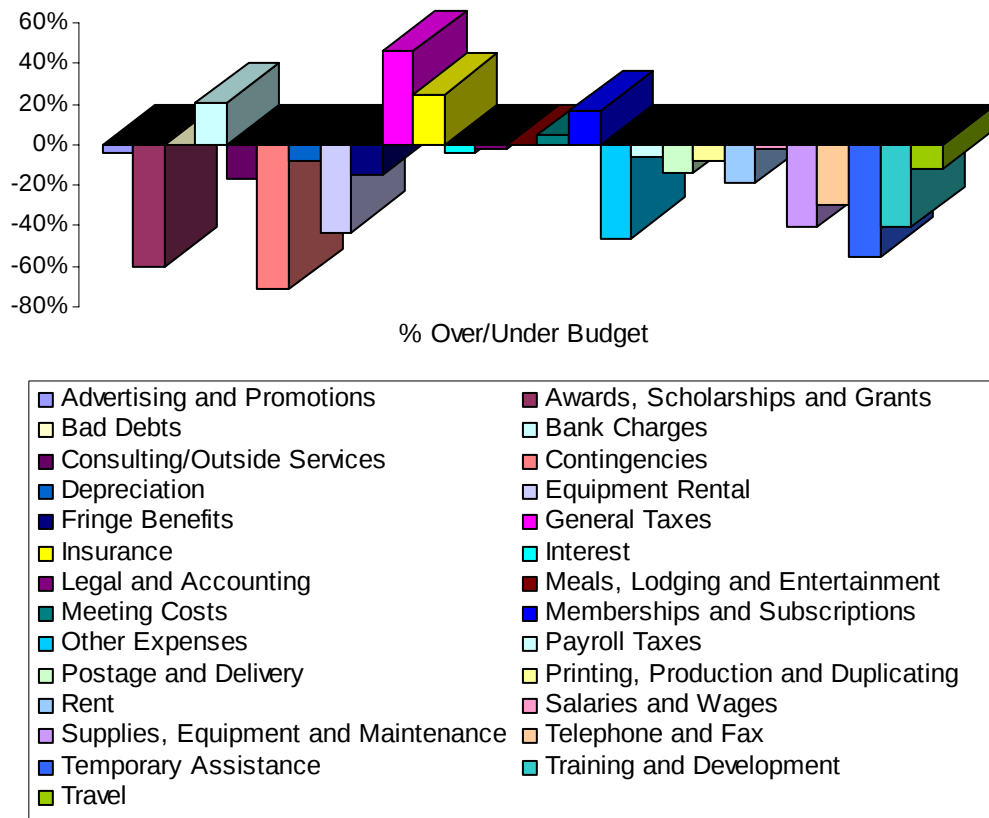


Exceeding Expectations:

Advertising: 31% | \$52,000
Member Dues: 6% | \$142,769
Publication Sales: 16% | \$77,757
Exhibit Fees: 7% | \$47,470
Registrations: 2% | \$45,500
Sponsorship: 17% | \$38,627
Interest Income: 21% | \$23,138

Nine months into the year, AACRAO has met its current year target for advertising income. Membership dues revenue is expected to stabilize and end close to goal. Publications income remains strong and the trend is expected to continue through the end of the fiscal year. Exhibit fees, registrations and sponsorship revenue continue to stay ahead of year-to-date budgeted comparisons mainly due to the 2008 Annual Meeting. In addition, approximately \$28,000 in registration fees related to two workshops (Admission Manager 101 and Managing the Registrars office), were recognized during June. The results of the Technology conference will show in the next month.

Expenses: Expenses for the nine months totaled \$5,419,597 or 68% of budget (7% below budget expectations.) Five expense activities exceeded their budgets, while twenty remained at or below budget.



Exceeded Budget:

Bank Charges: 31% | \$51,406

General Taxes: 46% | \$4,603

Insurance: 25% | \$11,231

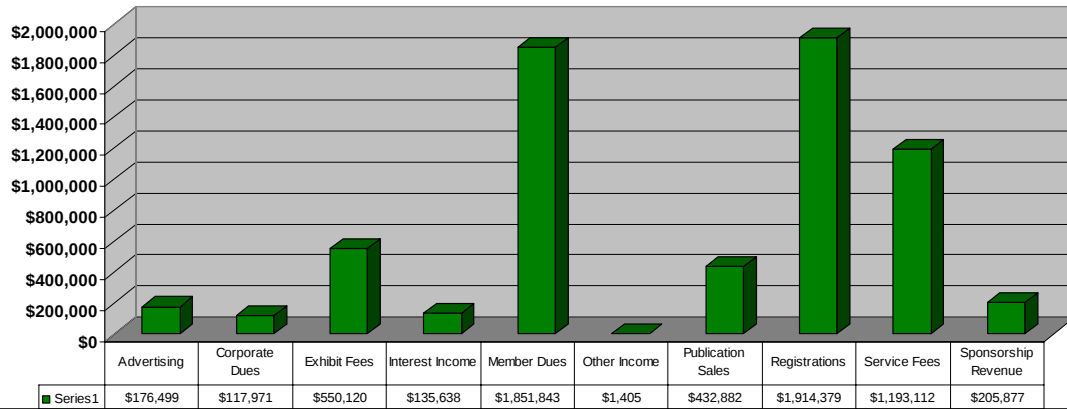
Meeting Costs: 5% | \$54,863

Memberships and Subscriptions: 17% | \$8,305

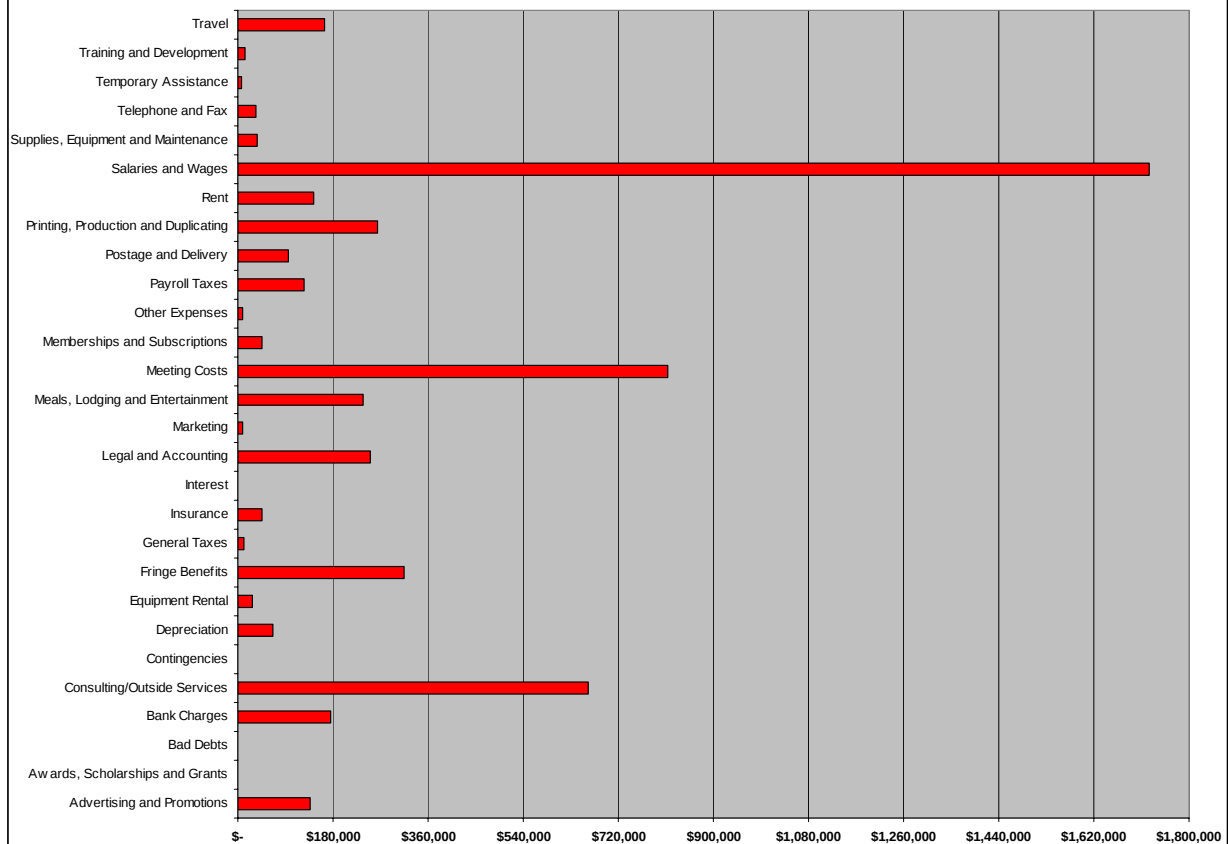
The overrun in the above expenditures reflects an increase in AACRAO's meeting-related activities and timing differences between actual and budgeted costs. General Taxes increased as a result of unrelated business income tax liability.

AACRAO Revenue and Expense Analysis – Year-to-Date

Actual Revenue



Actual Expenses



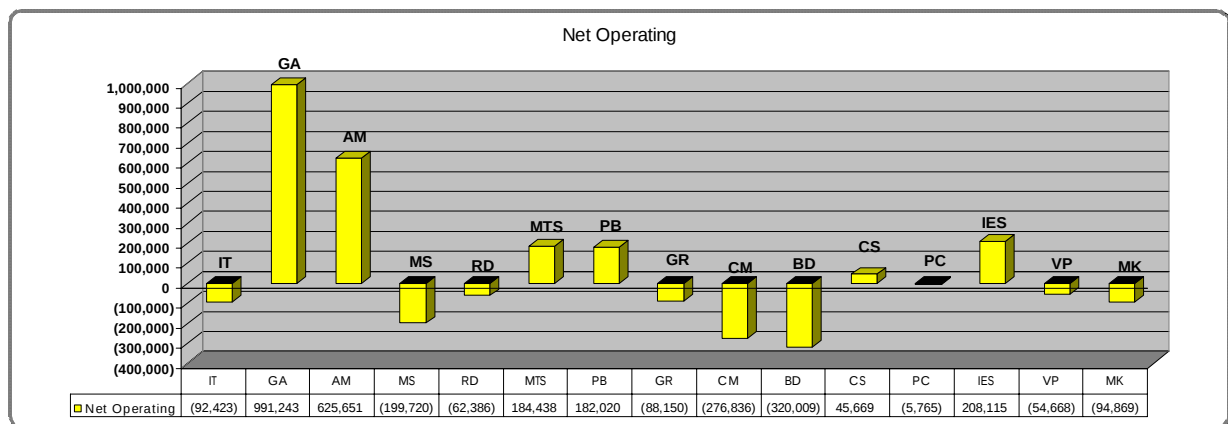
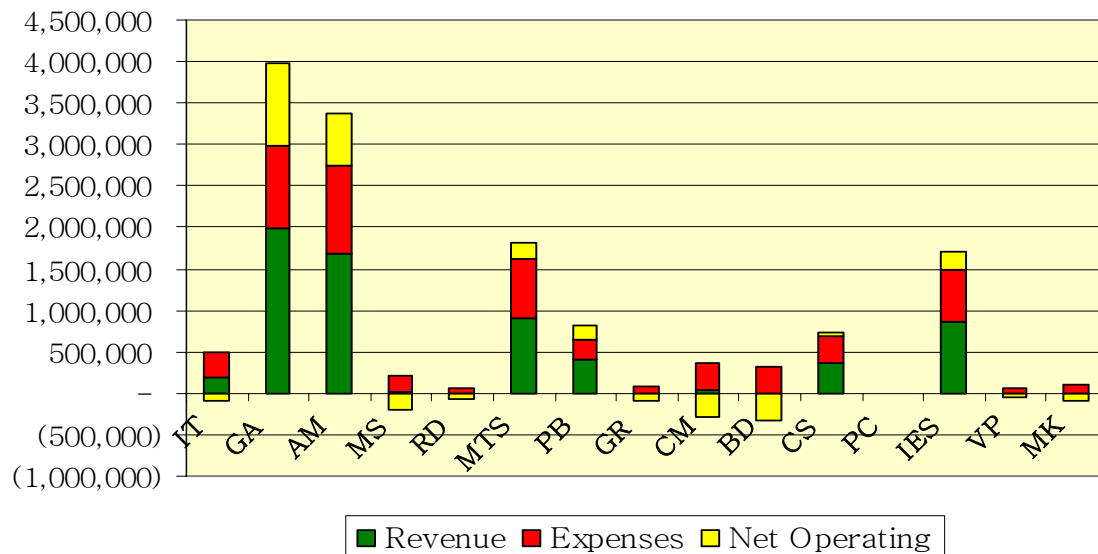
AACRAO Performance Analysis by Department

Year-to-date	IT	GA	AM	MS	RD	MTS	PB	GR
Revenue	197,555	1,988,499	1,683,362	11,000	-	903,004	409,424	-
Expenses	289,978	997,256	1,060,711	210,720	62,386	718,566	227,404	88,150
Net Operating	(92,423)	991,243	625,651	(199,720)	(62,386)	184,438	182,020	(88,150)

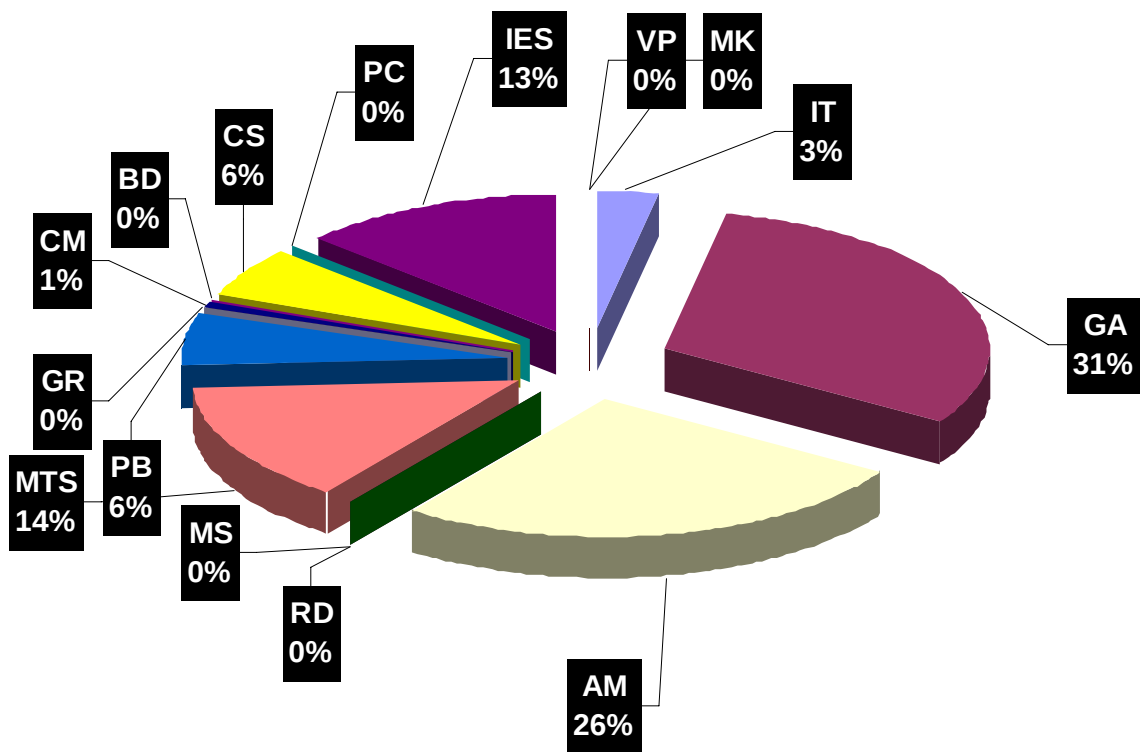
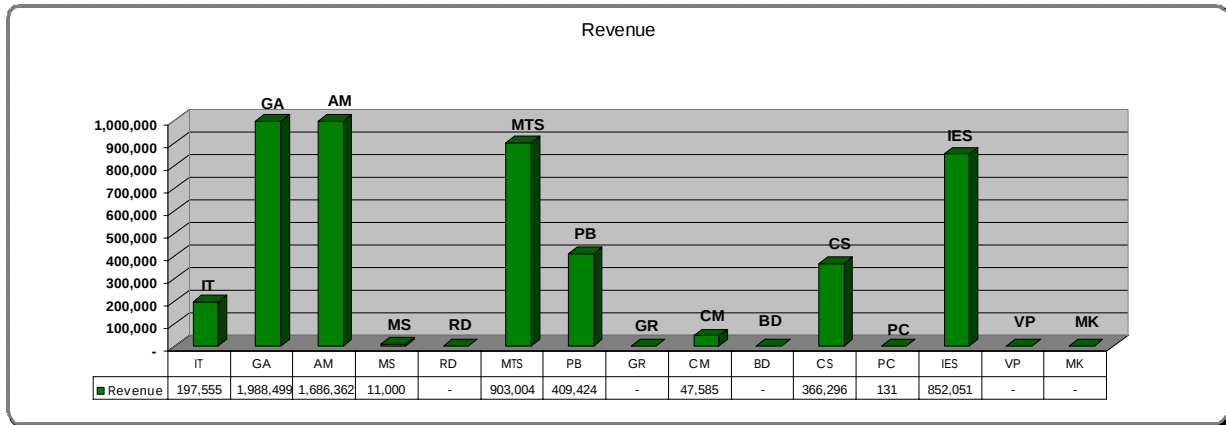
	CM	BD	CS	PC	IES	VP	MK	TOTAL
Revenue	47,585	-	366,296	131	852,051	-	-	6,461,909
Expenses	324,421	320,009	320,627	5,896	643,936	54,668	94,869	5,419,597
Net Operating	(276,836)	(320,009)	45,669	(5,765)	208,115	(54,668)	(94,869)	1,042,312

<i>Gifts/Bequests</i>	<i>135,000</i>
<i>Investments</i>	<i>(193,709)</i>
Net Income	<u>983,603</u>

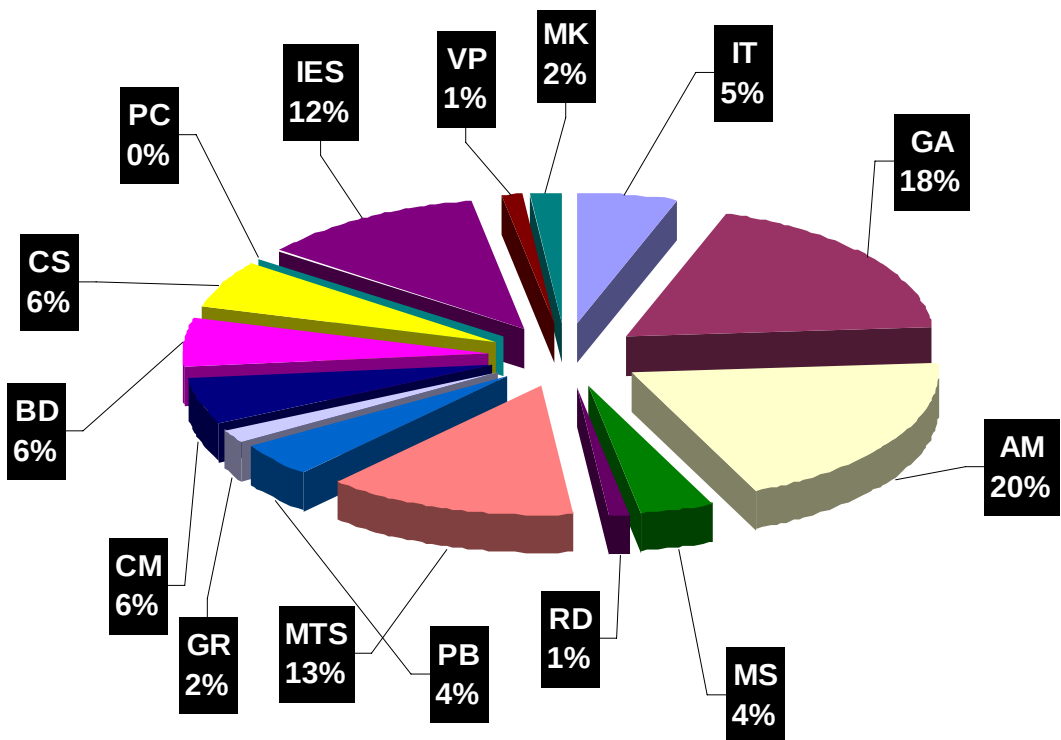
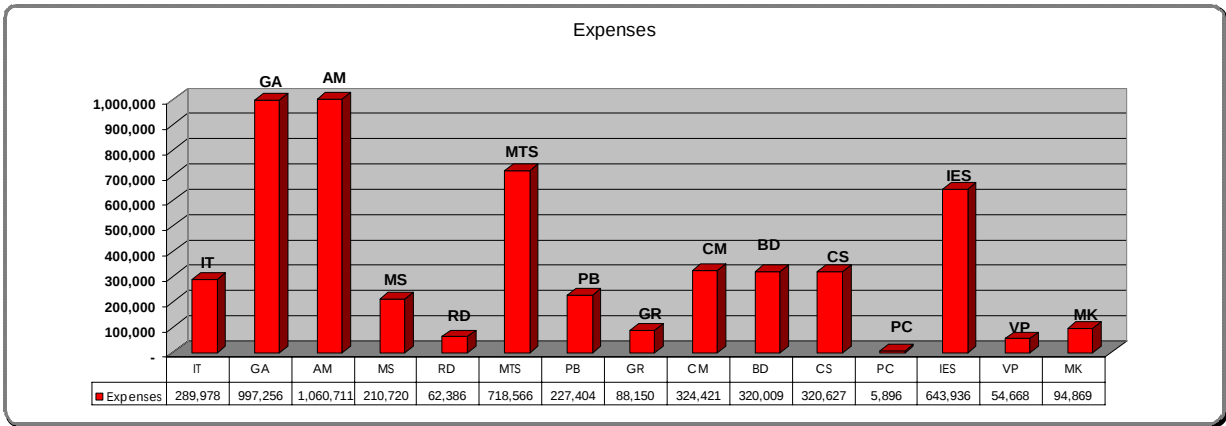
IT: Information Technology - GA: General and Administrative - AM: Annual Meeting - MS: Member Services - RD: Research - MTS: Meetings/Workshops - PB: Publications - GR: Government Relations - CM: Communications - BD: Governance - CS: AACRAO Consulting - PC: Projects Contracts - IES: Int'l Education Services - VP: Vice Presidents - MK: Marketing



Revenue



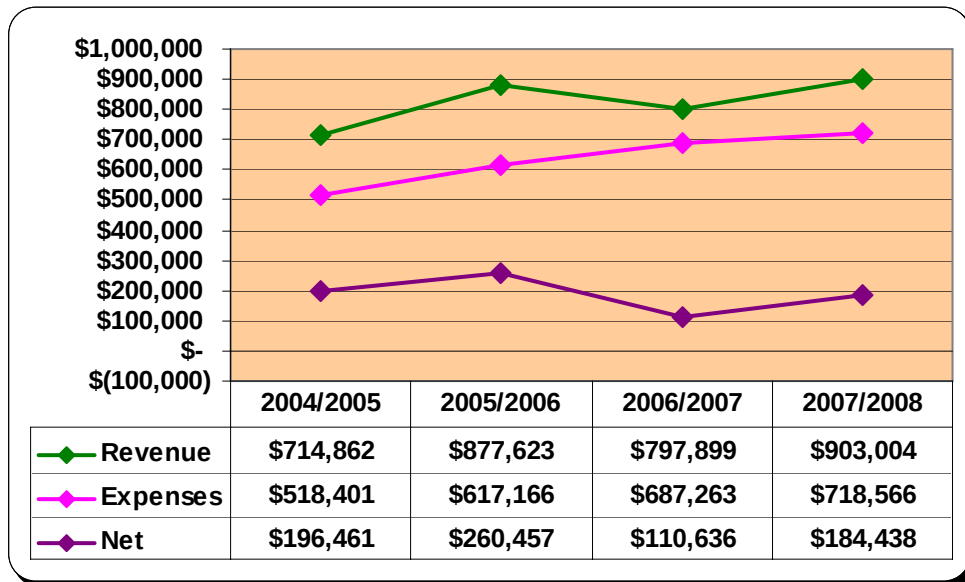
Expenses



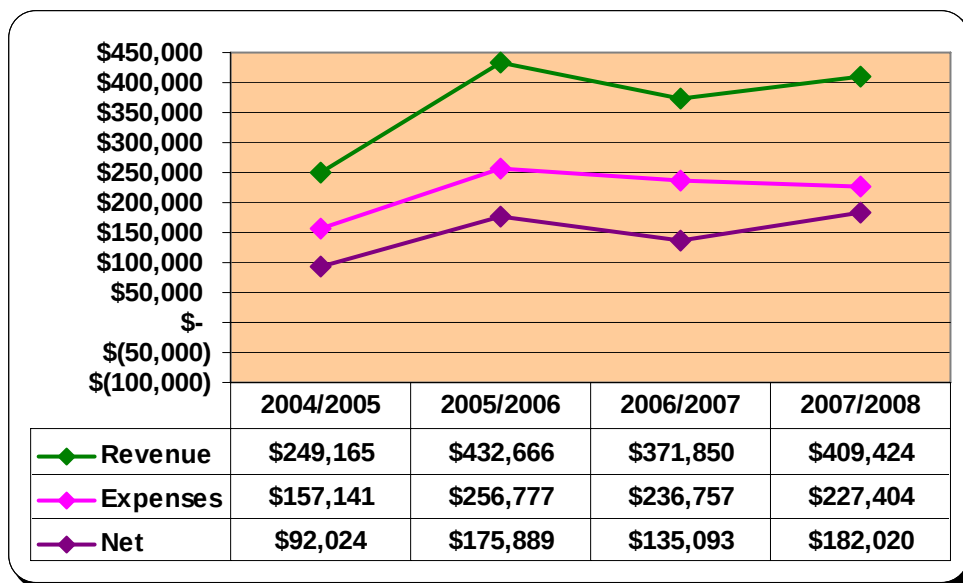
AACRAO Business Lines – Comparative Data

The following charts compare year-to-date department activities over the past four years:

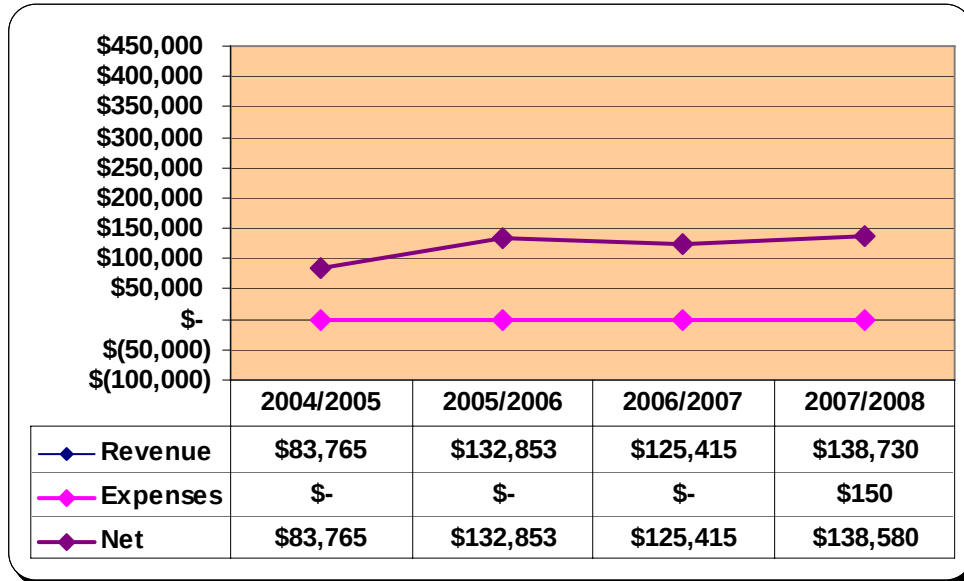
MTS



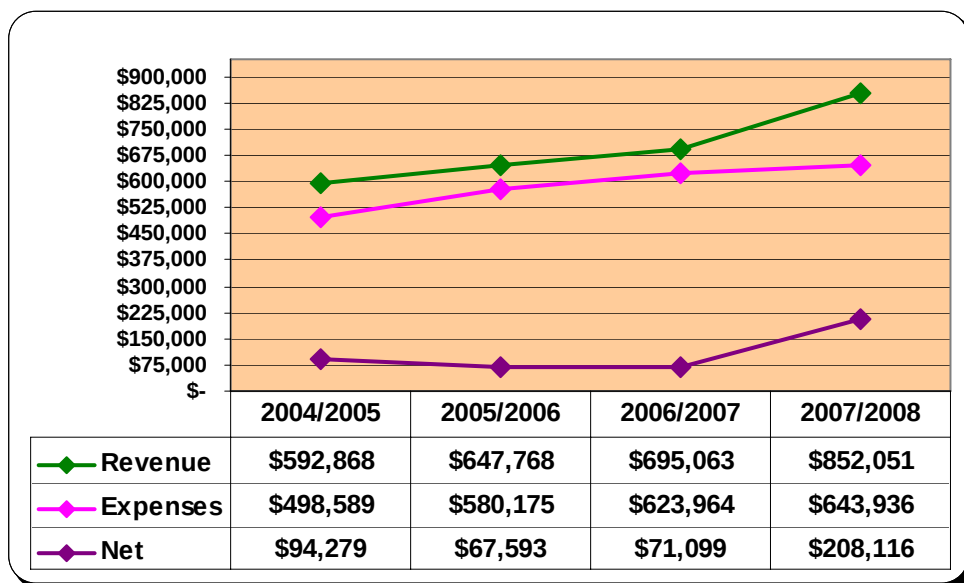
PUB



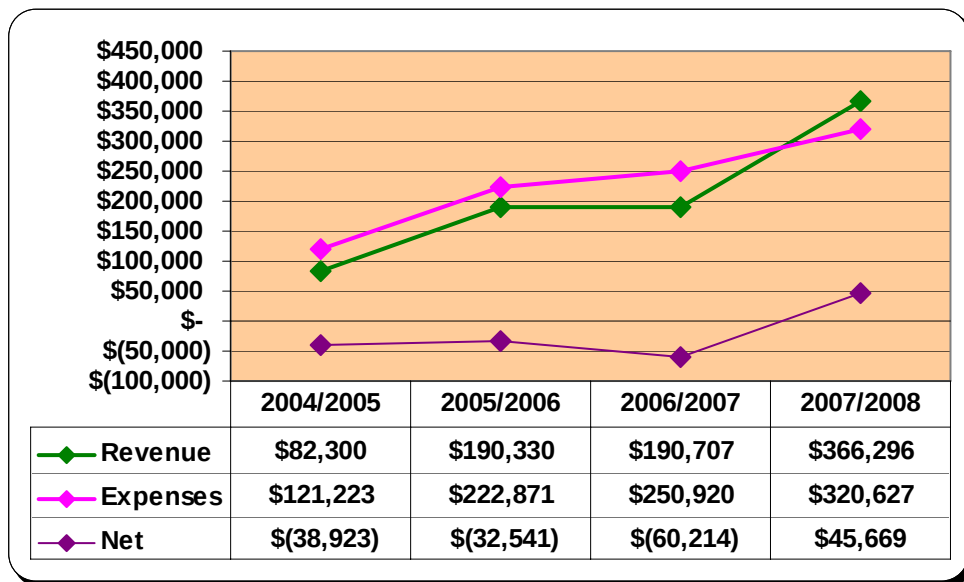
JOL



IES

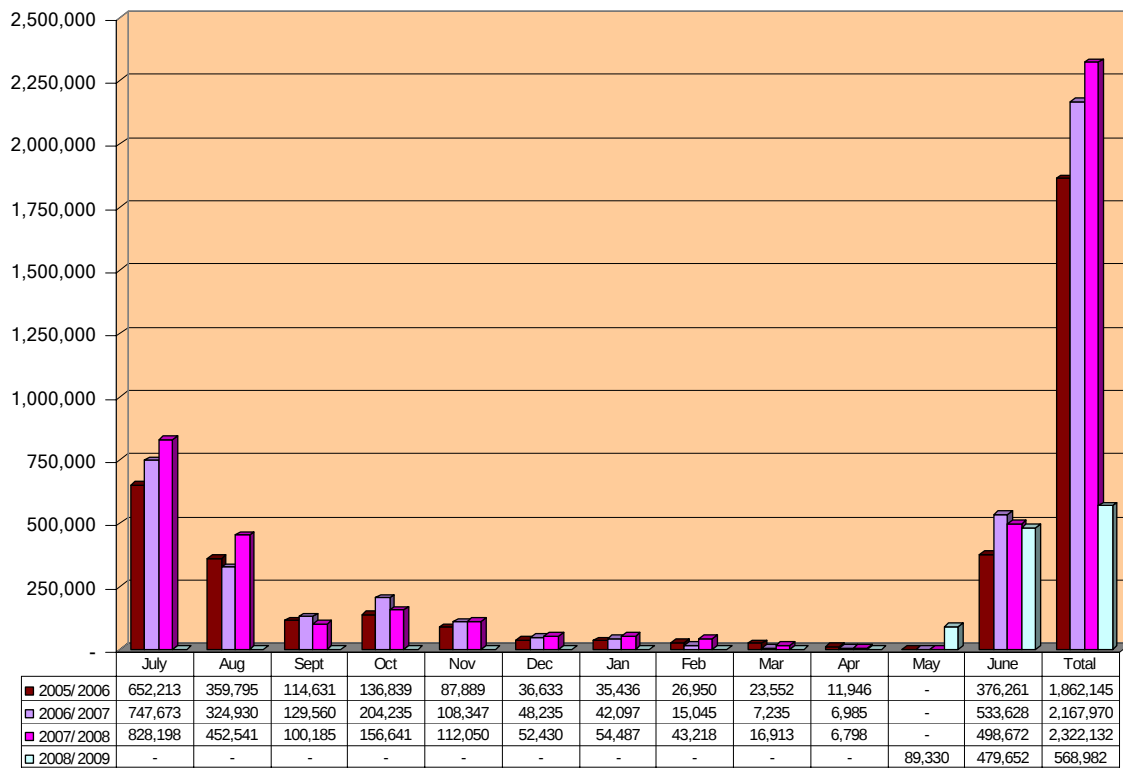


CS

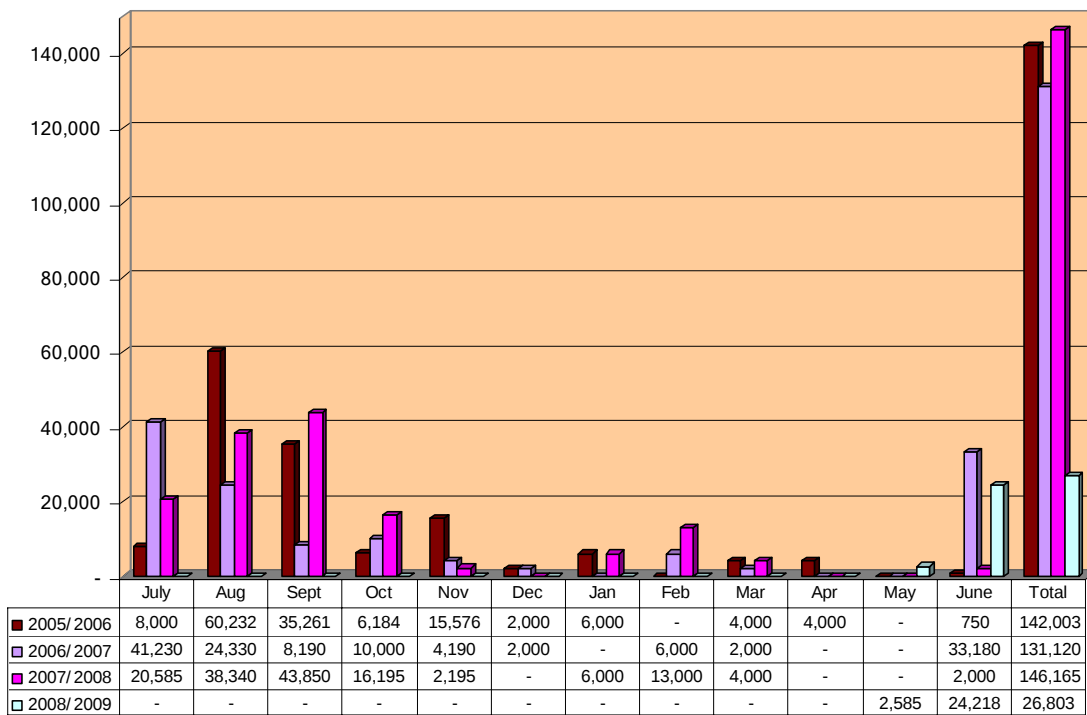


Appendix

Membership Dues: Cash Collections | Comparative Numbers



Corporate Dues: Cash Collections | Comparative Numbers



AMERICAN ASSOCIATION OF COLLEGIATE REGISTRARS AND ADMISSIONS OFFICERS EXECUTIVE DIRECTOR'S REPORT BOARD OF DIRECTOR'S MEETING

July 28-30, 2008

Kansas City, MO

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INFORMATION TECHNOLOGY

6390 WEBINARS

At the Annual Meeting in Orlando, AACRAO delivered five successful webinars, with the number of schools registering more than double the previous year's annual meeting total. AACRAO also partnered with a third party vendor (SPSS), to provide a two-part webinar on predictive analytics and student retention. In another high profile event, AACRAO produced a webinar for Community colleges on Implementing Direct lending. A distinguished panel from the Direct Lending collation and the Department

of Education gave practical advice to schools considering the program. Most recently, AACRAO produce a webinar from LeRoy Rooker's plenary speech at the Technology conference. Because of the early morning schedule and the challenge of attracting a live audio AACRAO plans to offer it solely as a rebroadcast.

AACRAO hope to begin offering more "on demand" professional development content and sees this as an early test of commercial viability.

Webinar Infrastructure Upgrades

AACRAO has taken significant steps to vary and adapt the kinds of rich media content that we stream from the web site. Currently, within a reasonably short timeframe; we can produce high quality video "episodes" of varying length on areas of topical interest. We are also evaluating methods of packaging other media rich events that could be attended on demand and will forum an online library of rich content for our members.

6500 WEB SERVICES

AACRAO CRM Upgrade

AACRAO continues to work with our database developers, Matrix, to prepare for a major upgrade of the AACRAO CRM system. Implementation has already begun on a key component of the upgrade: the tradeshow and exhibitor modules. These functions were previously handled by a third party (Corcoron), and now will be handled in house with the newly updated CRM system.

IT Infrastructure Review

Immediately following the Annual meeting, AACRAO engaged in an intensive, detailed and thorough review of every aspect of the office technology infrastructure. The intent was to identify any problems proactively, and to make sure that the various redundancies and alert systems were functioning properly. Our main concerns remains aging enterprise level hardware, and coincidentally we just experienced one failure but we were able recover with minimal downtime and no data loss given the procedures in plan.

AACRAO Membership Renewal

AACRAO successfully conducted a comprehensive update of our members; enrollment data using IPEDs and applied the next decrement in the new dues formula. For the first time, all invoicing was done using HTML mail with no apparent issues.

New Web Sites

AACRAO launched two new web sites: The Centennial Site and the IB Database. Both sites are still in the

early stages, but promise to be useful tools to the respected audiences once mature.

Transcript

AACRAO.org

Jobs Online

IES (Credentials)

November

December

January
February
0
2,000
4,000
6,000
8,000
10,000
12,000
14,000
16,000
18,000
20,000
22,000
24,000
26,000
28,000
30,000
32,000
34,000

Top Sections

November 31,166 18,286 5,526 4,864

December 28,963 16,005 3,047 4,269

January 31,870 24,536 3,299 6,346

February 30,802 23,357 3,536 5,639

Transcript AACRAO.org Jobs Online IES (Credent ials)

AACRAO.ORG Unique Visitors February 07 - July 2008

Unique Visitors

35,75 6
37,38 4
38,24 6
36,217
36,78 7
37,689
34,16 6
31,33 4
42,58 1
35,92 0
30,07 7
38,96 4
39,80 4 44,78 0
40,624
40,07 6
39,09 6
25,000
27,000
29,000
31,000
33,000
35,000
37,000
39,000

41,000

43,000

45,000

47,000

49,000

F e b - 07

M a r - 07

A p r -07

M a y-07

Jun-0 7

Jul- 0 7

A u g-0 7

S e p-0 7

O ct- 07

N ov-0 7

D ec-0 7

Jan- 0 8

F e b - 08

M a r - 08

A p r - 08

M a y-08

Jun- 0 8

Series1 35,756 37,384 38,246 36,217 36,787 37,689 34,166 31,334 42,581 35,920 30,077 38,964 39,804
44,780 40,624 40,076 39,096

February-
07

March-07 April-07 May-07 June-07 July-07 August-07 September-
07

October-
07

November-
07

December-
07

January-08 February-
08

March-08 April-08 May-08 June-08

Transcript

AACRAO.org

Jobs Online

IES (Credentials)

March

April

May

June

0

2,000

4,000

6,000

8,000

10,000
12,000
14,000
16,000
18,000
20,000
22,000
24,000
26,000
28,000
30,000
32,000
34,000

Top Sections

March 36,868 25,158 5,528 6,126

April 44,062 21,694 5,828 6,298

May 40,988 21,175 5,343 5,900

June 22,417 22,146 5,468 5,812

Transcript AACRAO.org Jobs Online IES (Credentials)

GENERAL AND ADMINISTRATIVE

6005 ACCOUNTING

Overview

Total revenue generated by AACRAO's operating activities exceeded expenses by \$10,282 for the current month. And \$1,059,678 for the eight months ending May 31, 2008.

The Association's investments performance resulted in net income of \$118,278 for the month and a \$7,804 for the eight months ending May 31, 2008.

The combined operating and investment activities resulted in a surplus of \$128,560 for the month and \$1,067,482 for the eight months ending May 31, 2008.

In addition, AACRAO received \$135,000 in bequests during fiscal year 2008.

Financial Position

The following summarizes AACRAO's financial position as of:

In terms of accounts analysis, the sharp decrease in the cash balance reflects disbursements for AACRAO's operating activities, related mainly to expenditures incurred for the annual meeting. The change in investments balance of \$118,540 reflects substantial increase in value due to improved market performance. The decrease in accounts payable in May is due to the payments of expenditures incurred for the annual meeting previously accrued. Unearned income increased in May primarily due to the receipt of membership dues for the next membership year.

As a result of the cross over between the dues year (July through June) and the fiscal year (October through September), three months of 2007/2008 dues were recognized in FY 2006/2007 while the other eight months have been recognized in FY 2007/2008. For the 2007/2008 membership year, \$2,322,132

May 2008 April 2008 Change

Cash **392,691** 759,716 (367,025)

Investments **5,605,314** 5,486,774 118,540

Accounts Receivable **199,548** 189,198 10,350

Prepaid Expenses **169,827** 156,177 13,650

Total Assets 6,636,568 6,872,838 (236,270)

Accounts Payable **91,974** 467,819 (375,845)

Unearned Income **665,575** 642,842 22,733

Total Liabilities 1,065,658 1,430,488 (364,830)

Net Assets 5,570,910 5,442,350 128,560

has been collected for membership dues and \$146,165 has been collected for corporate dues. Dues notices for membership year 2008/2009 were mailed in May, 2008. As of May 31, 2008, \$64,158 has been collected for membership dues and \$2,585 has been collected for corporate dues.

Statement of Activities

Revenue: Revenue generated for the eight months totaled \$6,021,870 or 73% of budget (6% above budget expectations.) Eight revenue generating activities exceeded their budget expectations of 67%. All others are either at or fell below expectations:

Exceeding Expectations:

Advertising: 29% | \$47,999

Member Dues: 6% | \$131,559

Publication Sales: 17% | \$81,548

Exhibit Fees: 15% | \$101,086

Registrations: 8% | \$210,552

Sponsorship: 25% | \$56,467

Interest Income: 11% | \$16,211

Other income: 3% | \$65

In most instances, the variance in budgeted and actual revenue arises due to timing differences. However, the recognition of the Annual Meeting related activities in March 2008, constituted an additional stream of revenue, positively impacting AACRAO's overall performance for the eight months ending May 31, 2008.

-20%

-15%

-10%

-5%

0%

5%

10%

15%

20%

25%

30%

% Over/Under Budget

Advertising Corporate Dues Exhibit Fees Interest

Member Dues Publication Sales Registrations Service Fees

Sponsorships Other Income

Expenses: Expenses for the eight months totaled \$4,962,192 or 62% of budget (5% below budget expectations.) Seven expense activities exceeded their budgets, while eighteen remained at or below budget.

Exceeded Budget:

Advertising: 1% | \$2,340

Bank Charges: 16% | \$25,598

General Taxes: 54% | \$5,403

Insurance: 27% | \$11,981

Meals and Lodging: 7% | \$21,717

Meeting Costs: 13% | \$134,740

Memberships and Subscriptions: 2% | \$766

The overrun in the above expenditures reflects an increase in AACRAO's meeting-related activities and timing differences between actual and budgeted costs. General Taxes increased as a result of unrelated business income tax liability.

-80%

-60%

-40%

-20%

0%
 20%
 40%
 60%
 % Over/Under Budget
 Advertising and Promotions Awards, Scholarships and Grants
 Bad Debts Bank Charges
 Consulting/Outside Services Contingencies
 Depreciation Equipment Rental
 Fringe Benefits General Taxes
 Insurance Interest
 Legal and Accounting Meals, Lodging and Entertainment
 Meeting Costs Memberships and Subscriptions
 Other Expenses Payroll Taxes
 Postage and Delivery Printing, Production and Duplicating
 Rent Salaries and Wages
 Supplies, Equipment and Maintenance Telephone and Fax
 Temporary Assistance Training and Development
 Travel

AACRAO Revenue and Expense Analysis – Year-to-Date

0
 200,000
 400,000
 600,000
 800,000
 1,000,000
 1,200,000
 1,400,000
 1,600,000
 1,800,000
 2,000,000

Actual Revenue

Revenues 159,219 105,791 550,120 16,949 1,405 0 1,658,332 398,793 1,880,084 1,045,299 205,877
 Advertising Corporate
 Dues
 Exhibit Fees Interest Labels/Mailing
 Lists/Other
 Management
 Fees
 Member Dues Publication
 Sales
 Registrations Service Fees Sponsorships

Actual Expenses

\$- \$180,000 \$360,000 \$540,000 \$720,000 \$900,000 \$1,080,000 \$1,260,000 \$1,440,000 \$1,620,000 \$1,800,000
 Advertising and Promotions
 Awards, Scholarships and Grants
 Bad Debts
 Bank Charges
 Consulting/Outside Services
 Contingencies
 Depreciation
 Equipment Rental
 Fringe Benefits
 General Taxes
 Insurance
 Interest
 Legal and Accounting
 Marketing
 Meals, Lodging and Entertainment
 Meeting Costs
 Memberships and Subscriptions
 Other Expenses
 Payroll Taxes
 Postage and Delivery
 Printing, Production and Duplicating
 Rent
 Salaries and Wages
 Supplies, Equipment and Maintenance
 Telephone and Fax
 Temporary Assistance
 Training and Development
 Travel

AACRAO Performance Analysis by Department

Year-to-date IT GA AM MS RD MTS PB GR

Revenue 177,025 1,781,938 1,683,362 11,000 - 874,959 376,405 -
 Expenses 231,744 895,462 1,042,044 183,724 55,098 673,556 207,173 37,687
Net Operating (54,719) 886,476 641,318 (172,724) (55,098) 201,403 169,232 (37,687)
CM BD CS PC IES VP MK TOTAL
 Revenue 46,516 - 297,450 131 773,084 - - **6,021,870**

Expenses 338,502 312,761 284,257 5,979 561,231 52,741 80,235 **4,962,192**
Net Operating (291,986) (312,761) 13,193 (5,848) 211,853 (52,741) (80,235) 1,059,678

Gifts/Bequests 135,000

Investments 7,804

Net Income 1,202,482

IT: Information Technology - **GA:** General and Administrative - **AM:** Annual Meeting - **MS:** Member Services - **RD:** Research -
MTS: Meetings/Workshops - **PB:** Publications - **GR:** Government Relations - **CM:** Communications - **BD:** Governance -
CS: AACRAO Consulting - **PC:** Projects Contracts - **IES:** Int'l Education Services - **VP:** Vice Presidents - **MK:** Marketing
(1,000,000)

(500,000)

-

500,000

1,000,000

1,500,000

2,000,000

2,500,000

3,000,000

3,500,000

4,000,000

IT

GA

AM

MS

RD

MTS

PB

GR

CM

BD

CS

PC

IES

VP

MK

Revenue Expenses Net Operating

IT

GA

AM

MS RD

MTS PB

GR

CM BD

CS PC

IES

VP MK

(400,000)

(300,000)

(200,000)

(100,000)

0

100,000

200,000

300,000

400,000

500,000

600,000

700,000

800,000

900,000

1,000,000

Net Operating

Net Operating (54,719) 886,476 641,318 (172,724) (55,098) 201,403 169,232 (37,687) (291,986) (312,761) 13,193 (5,848) 211,853 (52,741) (80,235)

IT GA AM MS RD MTS PB GR CM BD CS PC IES VP MK

Revenue

IT

GA AM

MS RD

MTS

PB

GR

CM BD
CS
PC
IES
VP MK

-
100,000
200,000
300,000
400,000
500,000
600,000
700,000
800,000
900,000
1,000,000

Revenue

Revenue 177,025 1,781,938 1,683,362 11,000 - 874,959 376,405 - 46,516 - 297,450 131 773,084 - -
IT GA AM MS RD MTS PB GR CM BD CS PC IES VP MK

Expenses

IT
GA
AM
MS
RD
MTS
PB
GR
CM BD
CS
PC
IES
VP MK

-
100,000
200,000
300,000
400,000
500,000
600,000
700,000
800,000

900,000
1,000,000

Expenses

Expenses 231,744 895,462 1,042,044 183,724 55,098 673,556 207,173 37,687 338,502 312,761 284,257 5,979 561,231 52,741 80,235
IT GA AM MS RD MTS PB GR CM BD CS PC IES VP MK

AACRAO Business Lines – Comparative Data

The following charts compare year-to-date department activities over the past four years:

\$(100,000)

\$-

\$100,000

\$200,000

\$300,000

\$400,000

\$500,000

\$600,000

\$700,000

\$800,000

\$900,000

\$1,000,000

Revenue \$659,214 \$859,538 \$742,332 \$874,959

Expenses \$522,867 \$606,735 \$647,066 \$673,556

Net \$136,347 \$252,803 \$95,266 \$201,403

2004/2005 2005/2006 2006/2007 2007/2008

\$(100,000)

\$(50,000)

\$-
 \$50,000
 \$100,000
 \$150,000
 \$200,000
 \$250,000
 \$300,000
 \$350,000
 \$400,000
 \$450,000
 Revenue \$84,604 \$118,934 \$169,912 \$376,405
 Expenses \$58,117 \$55,748 \$92,376 \$207,173
 Net \$26,487 \$63,186 \$77,536 \$169,232
 2004/2005 2005/2006 2006/2007 2007/2008
 \$(100,000)
 \$(50,000)
 \$-
 \$50,000
 \$100,000
 \$150,000
 \$200,000
 \$250,000
 \$300,000
 \$350,000
 \$400,000
 \$450,000
 Revenue \$33,130 \$46,365 \$45,275 \$121,450
 Expenses \$- \$- \$- \$-
 Net \$33,130 \$46,365 \$45,275 \$121,450
 2004/2005 2005/2006 2006/2007 2007/2008
 \$-
 \$50,000
 \$100,000
 \$150,000
 \$200,000
 \$250,000
 \$300,000
 \$350,000
 \$400,000
 \$450,000
 \$500,000
 \$550,000
 \$600,000
 \$650,000
 \$700,000
 \$750,000
 \$800,000
 Revenue \$256,449 \$319,489 \$342,678 \$773,084
 Expenses \$220,929 \$259,676 \$252,756 \$561,231
 Net \$35,520 \$59,814 \$89,921 \$211,853
 2004/2005 2005/2006 2006/2007 2007/2008
 \$(100,000)
 \$(50,000)
 \$-
 \$50,000
 \$100,000
 \$150,000
 \$200,000
 \$250,000
 \$300,000
 \$350,000
 \$400,000

\$450,000

Revenue \$50,300 \$62,250 \$60,725 \$297,450

Expenses \$65,372 \$81,515 \$70,442 \$284,257

Net \$(15,072) \$(19,265) \$(9,717) \$13,193

2004/2005 2005/2006 2006/2007 2007/2008

Appendix

Membership Dues: Cash Collections | Comparative Numbers

Corporate Dues: Cash Collections | Comparative Numbers

-
250,000
500,000
750,000
1,000,000
1,250,000
1,500,000
1,750,000
2,000,000
2,250,000
2,500,000
2005/2006 376,261 652,213 359,795 114,631 136,839 87,889 36,633 35,436 26,950 23,552 11,946 - 1,862,145
2006/2007 533,628 747,673 324,930 129,560 204,235 108,347 48,235 42,097 15,045 7,235 6,985 - 2,167,970
2007/2008 498,672 828,198 452,541 100,185 156,641 112,050 52,430 54,487 43,218 16,913 6,798 - 2,322,132
2008/2009 - - - - - 64,158 64,158
June July Aug Sept Oct Nov Dec Jan Feb Mar Apr May Total

-
20,000
40,000
60,000
80,000
100,000
120,000
140,000
2005/ 2006 750 8,000 60,232 35,261 6,184 15,576 2,000 6,000 - 4,000 4,000 - 142,003
2006/ 2007 33,180 41,230 24,330 8,190 10,000 4,190 2,000 - 6,000 2,000 - - 131,120
2007/ 2008 2,000 20,585 38,340 43,850 16,195 2,195 - 6,000 13,000 4,000 - - 146,165
2008/ 2009 - - - - - 2,585 2,585
June July Aug Sept Oct Nov Dec Jan Feb Mar Apr May Total

6015 GENERAL OPERATIONS

The AACRAO staff reviewed Blue Cross/Blue Shield renewal proposals and selected a multiple option plan for its employees. The accepted package ensures employees are afforded the same scope of care as under the old plan while at the same time reducing the annual premium.

The AACRAO Executive Staff and Department heads reviewed and finalized changes to the Employee Handbook. Although changes are minimal compliance in the past has been inconsistent. To ensure the staff fully understands and benefits from the provisions of the handbook a series of trainings are scheduled for September 2008.

The AACRAO staff and McQuade Brennan have reviewed and are selecting representative performance metrics and ratios that can be benchmarked against like associations. These will provide the management and the Board with easily used comparative numbers that can help value the Associations wellness.

The AACRAO Marketing Staff and IES completed a major product and theme review focusing on a consistency of look and branding. Newly developed products are better targeted to appropriate market segments, are lower in cost to produce, are exportable to prospective clients and users and reinforce the uniqueness of the service. This is expected to support and expand the greater than 40% increase in applicants IES has seen this year.

McQuade Brennan finalized and distributed the developmental support documents for the 2009 Budget development. These have been reviewed by the AACRAO staff, inputs made, reviewed by management and incorporated in the budget projections.

AACRAO's IES and IT department integrated a new linked process for the receipt and assignment of applicant files. Files are now more rapidly reviewed and assigned for evaluation.

AACRAO's IES and IT departments completed an upgrade to the servicing database which provides for better and more accurate information sharing with the applicant. This has reduced the number of individual inquiries and improved throughput.

AACRAO's IES and IT departments developed and put into service an online institutional

application. This was a natural complement to the individual online application and is expected to generate a like growth in applications.

ANNUAL MEETING

6105 CURRENT ANNUAL MEETING

Registration

The official annual meeting attendance was 3020 which makes it the fifth largest meeting ever. This compares to New York City – the biggest – where we had 3380 people, San Diego – the second largest – where we had 3274 people, Las Vegas – the third largest – with 3270 and Boston – the fourth largest – with 3142. We exceeded the budget target by eleven member registration and missed nonmembers by 31. See more registration information below in Annual Meeting Registration Statistics 1998-2008.

Attendees represented 38 countries in addition to all 50 states. Ninety-five registrants were from Canada and 101 were from other countries.

Participation by voting members has varied over the last four years. This year, 42% of attendees were voting members. In Boston, 44% of attendees were voting members. In San Diego, 58% of attendees were voting members and in New York, 66% of attendees were voting members but only 40% were in Las Vegas.

Method of Registrations

This year the number of web registrations decreased slightly to 49.5% from 53% in Boston. Once again, more registrants registered by the web than by any other method (fax, mail, on site). On site registrations were down from last year.

2004

Las Vegas

2005

New York City

2006

San Diego

2007

Boston

2008

Orlando

Web 41% 43% 49% 53% 49.5%

Fax 26% 24% 21% 19% 39%

Mail 25% 24% 21% 18% 4.5%

On site 8% 7% 8% 11% 7%

Date of Registration

The number registering by the early bird deadline has remained fairly consistent ranging from 72% in Washington to 68% this year in Orlando.

2004

Las Vegas

2005

New York City

2006

San Diego

2007

Boston

2008

Orlando

Earlybird 71% 70% 70% 67% 68%

Regular 29% 30% 30% 33% 32%

Method of Payment

Credit card payments increased by 2% to 77% of total revenue.

2004

Las Vegas

2005

New York City

2006

San Diego

2007

Boston

2008

Orlando

Checks 36% of total
revenue

37% of total

revenue

30% of total

revenue

25% of total

revenue

23% of total

revenue

Credit

cards

64% of total

revenue

63% of total

revenue

70% of total

revenue

75% of total

revenue

77% of total

revenue

AACRAO Annual Meeting Registration Statistics

1998-2008

Chicago Charlotte New

Orleans

Seattle Minneapolis Washington Las

Vegas

New York

City

San Diego Boston Orlando

1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008

Actual Budget

Member 1954 1550 2031 1927 1712 1465 2095 2066 2026 1923 2036 2025

Nonmember 78 70 99 163 106 91 187 189 163 103 139 170

Nonmember Corporate - - - - - 15 13 -

Minority first-time attendee 137 85 80 53 69 77 220 235 186 155 133 200

Student 10 6 99 - - -

Complimentary 64 68 81 52 45 58 76 60 50 48 40 -

Presenter only/Presenter

One Day

183 0 0 61 30 39 33 31 17 57

Presenter complimentary

full meeting

20 29 17

high school 18 9 22 43 18 5 NA NA NA - -

one day – member 75 21 9 31 60 58 41 96 49 96 68 35
 one day – nonmember 5 13 3 12 10 18 14 33 12 44 21 -
 Exhibitor (complimentary) 231 363 357 500 350 400 451 469 587 484 435
 Exhibitor (paying meeting
 registration)
 20 15 13 15 23 13 38 5
 Exhibitor (hall only, over
 and above)
 49 27
 Workshop only 3 0 11 8 5 14 2 8 13 9 0
 Other 8 29 47 38 49 49 50 49
 Total 2778 2200 2740 2885 2437 2272 3172 3279 3194 3030 2966
 Guests 93 69 150 79 38 83 88 89 71 47 46 90
 guests (comp) 3 3 6 10 12 9 7 8
 TOTAL 2871 2269 2890 2967 2478 2361 3270 3380 3274 3142 3020
 Exhibiting companies 106 102 96 97 101 98 114 117 108
 Booth spaces sold 131 139 109 149 146 143 152 149 171 184 176 170
 1 9

2010 New Orleans

Preparations are underway for our Centennial Celebration in New Orleans. We are currently securing space for a Gala Event at Blaine Kern's Mardi Gras World and booking Rockin' Dopsie, Jr. & The Zydeco Twisters for entertainment. Dates for the summer planning meeting for the 2010 Annual Meeting and Board meeting are currently being researched.

2011 Seattle

The change from Reno to Seattle was completed for the 97th Annual Meeting. The selected dates are Sunday, March 20 – Wednesday, March 23, 2011. Easter is April 24 and Passover is April 18-26 and will not impact this program. The meeting will be held at the Washington State Convention & Trade Center with the newly renovated Sheraton Seattle Hotel serving at the headquarters' hotel.

2012 Philadelphia

The 98th Annual Meeting will be held in Philadelphia, Pennsylvania. The dates are Sunday, April 1 – Wednesday, April 4, 2012. Easter is April 8 and Passover is April 6-14 and will not impact this program. This meeting will be held at the Pennsylvania Convention Center with the Philadelphia Marriott Hotel serving as the headquarters' hotel.

2013 San Francisco

The 99th Annual Meeting will be held in San Francisco, California. The dates are Sunday, April 14 – Wednesday, April 17, 2013. Easter is March 31 and Passover is March 25 – April 2 and will not impact this program. This meeting will be held at the Moscone West Convention Center with the San Francisco Marriott Hotel serving as the headquarters' hotel.

There have been a significant attempt to recognize the likely reduction in attendance at the Annual Meeting and the other smaller meetings reported on later in this report. In order to compensate for this loss in revenue which could have serious financial implications for the Association we have also reduced costs where ever possible. These reductions have been made in food and beverage events, speaker fees and notably in the decision to bring the marketing and administration of the exhibit program back in house after several years of contracting with a private company for these services. Planning will take this fall and the handoff will take place at the Chicago Annual Meeting next April. The first Annual Meeting fully back under our administration will be the 2010 meeting in New Orleans.

6120 EXHIBITS

2008 Orlando

Our final 2008 booth count included 108 companies exhibiting in 176 booths, which is a small decrease of just over 4% from last year, but still six booths over budget. Corcoran Expositions, Inc. conducted on-site registration for the 2009 Annual Meeting, which has proven to be very successful in the past. Exhibitors had the opportunity to reserve booth space based on a priority point system. On-site, 68 companies reserved 135 booths for 2009. This compares with 64

companies reserving 126 booths in Boston for the 2008 meeting.

We had 21 companies make corporate presentations, 3 companies host user groups, and 13 ad placements.

The following sponsorships were sold:

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- ImageNow - Badge Holders
- Datatel – Totebags
- Australian Education International – International Educators' Reception
- Scantron – Session Evaluations
- Jostens – Bookstore Bags and Awards
- Educational Testing Service (ETS/TOEFL) – International Educators' Reception
- College Board – Cultural Diversity Luncheon and Caucus Meetings Boxed Lunches
- CollegeSource – Opening Keynote Speaker
- Capella University – First-Time Attendees' Orientation and Welcome
- SunGard Higher Education - APEX Award and Transition Screen
- Golden Key International Honour Society - Membership Cards
- SPSS - Cyber Café
- IELTS International - Graduate and Professional Schools Luncheon
- Azorus - Room Keys
- CAMS Three Rivers Systems - Notepads
- National Student Clearinghouse - Registrar 101 Workshop

2009 Chicago

Our prospects for exhibit participation in Chicago are looking good! At this time 137 booths are reserved out of a total of 183 booths. That represents 75% of the exhibit hall being sold. On-site, 68 companies reserved 135 booths for 2009. This compares with 64 companies reserving 126 booths in Boston for the 2008 meeting.

The Annual Meeting corporate opportunities brochure has been completed, and will be distributed to Technology Conference participants in July. Copies will be mailed to Corcoran Expositions as well, and they will use the brochure in their marketing efforts.

2009 Annual Meeting exhibitors to date include:

- Ad Astra Info System
 - Association of College Honor Societies
 - Avow Systems, Inc.
 - BookWear
 - CIBER, Inc
 - CollegeNET, Inc.
 - CollegeSource Inc.
 - Credentials Inc.
 - Datatel, Inc.
 - Docufide, Inc.
 - Education Systems, Inc.
 - Educational Credential Evaluators, Inc.
 - EMPOWER / ComSpec International, Inc.
 - EMS by Dean Evans & Associates, Inc.
 - ETS (Educational Testing Service)
 - Experian QAS
 - Herff Jones, Inc.
-

- Hyland Software, Inc.
- ImageNow by Perceptive Software, Inc.
- INFORMS, Inc.
- Infosilem Inc.
- International Education Research Foundation, Inc. (IERF)
- Jonesville Paper Tube Corporation
- Jostens
- Leepfrog Technologies, Inc.
- Miami University - DARS Project
- Mindwrap, Inc.
- National Student Clearinghouse
- Overture Technologies
- Paradigm, Inc.
- Petersons, a Nelnet Company
- Phi Theta Kappa International Honor Society
- PlattForm, Inc.
- 21
- RightNow Technologies
- Runner Technologies, Inc.
- SCRIP-SAFE Security Products, Inc.
- SunGard Higher Education
- Talisma Corporation
- Three Rivers Systems, Inc.
- U.S. Army Recruiting
- University of Cambridge International Examinations
- World Education Services, Inc.
- Xap Corporation

MEMBER SERVICES

6205 MEMBER MAINTENANCE

Membership 2007-2008

The 2007-2008 membership year ended on June 30th, 2008 and the growth trend continued this year in terms of revenue and number of institutions (for an eighth year in a row).

Annual Comparison – Dues

The table below contains an annual comparison of dues collected.

Member Corporate Total

2007-2008	\$2,322,132.00	\$146,165.00	\$2,468,297.00
2006-2007	\$2,253,434.00	\$131,120.00	\$2,384,554.00
2005-2006	\$2,096,724.00	\$142,003.00	\$2,238,727.00
2004-2005	\$1,992,754.00	\$129,850.00	\$2,122,604.00
2003-2004	\$1,831,564.74	\$145,300.00	\$1,976,864.74
2002-2003	\$1,755,854.00	\$143,150.00	\$1,899,004.00
2001-2002	\$1,723,996.41	\$108,125.00	\$1,832,121.41
2000-2001	\$1,701,951.00	\$104,537.50	\$1,806,488.50
1999-2000	\$1,553,379.00	\$ 93,700.00	\$1,677,079.00

Annual Comparison - Institutional Membership Renewal Numbers

Institutional Members

Renew New Dropped Total

2007-2008 2,506 (96%) **145 (5%) 99 (4%) 2,651
2006-2007 2,461 (97%) **144 (5%) 81 (3%) 2,605
2005-2006 2,385 (95%) **157 (6%) 130 (5%) 2,542
2004-2005 2,344 (97%) **171 (7%) 70 (3%) 2,515
2003-2004 2,258 (97%) **156 (7%) 80 (3%) 2,414
2002-2003 2,231 (96%) **107 (5%) 102 (4%) 2,338
2001-2002 2,220 (95%) 113 (5%) 105 (5%) 2,333
2000-2001 2,179 (97%) 76 (3%) 70 (3%) 2,325
1999-2000 2,113 (94%) 19 (1%) 134 (6%) 2,266

2 2

** Does not include Organizational or Individual Members

Dropped Members

There are two different types of dropped members. Cancelled Members are those who have contacted the AACRAO office to indicate that they are canceling their membership. Unpaid Members are those who have not paid their dues.

Cancelled Institutional Members 2007-2008

In 2007-2008, 37 institutions have cancelled membership.

Unpaid Members 2007-2008

A total of 99 institutions (4%) did not pay their dues for 2007-2008.

Membership Renewal 2008-2009

The renewal process started this year with the enrollment for each institution being adjusted according to IPEDS data. Invoices were sent to all primary contacts (May 27, 2008) in HTML format

New Dues Calculation

AACRAO implemented a new dues structure for 2007-2008 based on FTE rather than headcount. As a result of the new dues calculation, in 2007-2008 we had a loss of \$34,905 (1.5%) in membership dues. We anticipate the same additional loss in 2008-2009 as the FTE dues calculation is further reduced from two-thirds of part-time students to one half of part-time students.

Membership Renewal 2008-2009 – Institutions with no IPEDS Unit ID

In preparation for the new membership year, we began a campaign to update enrollments for all Institutional and Affiliate members with no IPEDS Unit ID. Of a total of 200 institutions with no Unit ID, including 127 international institutions, we have received updated enrollment figures for 43 institutions. As a result of this effort, we obtained an increase in 52 size codes, translating to an approximate increase in membership dues of \$10,556.

Recruitment Campaign to Past Members

As part of the renewal process, we will also send renewal information to dropped members from the past eight years:

This project proved to be very successful as shown in the following results:

Year

Institutions

Inactive

Institutions

Rejoining Total Revenue

2004-2005 296 45 \$24,316
2005-2006 262 28 \$14,230
2006-2007 368 35 \$18,750
2007-2008 352 49 \$29,152

2 3

Call for Award Nominations

This year, the awards nomination process will be made available online for a second year. The awards process for the following seven awards will begin in September with twice weekly advertisements in *MemberLink* and *Transcript*. The deadline for nominations will be November 28, 2008.

- APEX (Achieving Professional Excellence in Education Administration) Award
- Exemplary New Member Award
- Award for Excellence in International Education
- Honorary Membership and Distinguished Service Awards
- Elbert W. Ockerman State and Regional Professional Activity Award
- Founders Award for Leadership
- Thomas A. Bilger Citation for Service

As in years past, Jostens will sponsor all the plaques and certificates, except the APEX award, sponsored by SunGard Higher Education.

AACRAO Demographic Information

A message was sent to all AACRAO members on February 26 with a link to our demographic information at <http://www.aacrao.org/about/demographics.cfm>.

The response to this stand-alone personalized email was very good. The Membership Department received many emails and phone calls immediately following this message.

The message also contained a link for members to update their information online, including personalizing their User ID and password.

www.aacrao.org/members_only/IndividualFormPublicMembersEditInfo/editMyInfo

AACRAO Committees

On February 20, end-of-term letters were sent to all expiring committee members. For those having served less than 3 years of service, they were given the option of extending their term on their committee. For those having served the maximum term of 3 years, they were encouraged to continue their involvement in AACRAO and sign up for another committee. The response was rapid and positive, with almost all eligible committee members choosing to extend their term.

New List Serve for Community College Issues

AACRAO created a new Community College list serve in mid June. As of June 30, 2008, we had over 500 subscriptions. The list serve will focus on all community college issues such as open and rolling admission, articulation, collaborations, transferability, prior learning assessment, placement issues, military credit, student services for non-traditional students of all kinds and any other relevant issues. A welcome message was posted along with information on the June 26th Community College Webinar. We will follow up with membership information for the nonmember subscribers.

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1.) AACRAO Membership YR END 00-01 YR END 01-02 YR END 02-03 YR END 03-04 YR END 04-05 YR END 05-06 YR END 06-07 YR END 07-08

Institutional Members

Paid Institutions 2275 2274 2262 2316 2395 *2424 2504 2537

Paid Institutional Individuals 8733 9136 9175 9671 9846 10004 10610 10619

Unpaid Institutions 66 127 102 67 57 125 57 62

Affiliated Institutions

Paid Affiliated Institutions 50 58 85 107 129 *103 117 130

Paid Affiliated Individuals 67 118 197 276 270 209 247 252

Unpaid Affiliated Institutions 0 5 9 13 13 19 24 15

Individual Members

Paid International 14 15 15 17 22 26 29 29

Paid High School 18 14 12 8 17 13 13 13

Paid Retired 9 12 9 12 9 8 8 9

Paid Student 4 5 2 4 3 2 4 1

Honorary Members 82 84 81 82 86 90 89 88

Corporate Partners

Paid Corporate 83 89 73 77 76 65 59 66

Paid Corporate Individuals 131 129 110 124 116 118 110 121

Unpaid Corporate 3 15 35 11 17 18 14 10

Organizational Partners

Paid Organizations 14 20 18 25 29 32 30 31

Paid Organizational Individuals 19 22 19 38 39 46 **61 **67

Unpaid Organizations 0 2 4 1 2 3 3 8

Unpaid Organizational Individuals 0 2 4 1 3 3 3 8

Active Members

Active Voting Individuals 8733 9136 9175 9671 9846 10,004 10,610 10,619

Active Nonvoting Individuals 344 399 445 561 562 512 561 580

Total Number of Active Members 9077 9535 9620 10,232 10,408 10,516 11,171 11,199

Active Organizations

Active Voting Institutions 2275 2274 2262 2316 2395 2424 2504 2537

25

Active Nonvoting Institutions/Corp/Organizations 147 167 176 209 234 200 206 227

Total Active Organizational Membership 2422 2441 2438 2525 2629 2624 2710 2764

2.) Dues

AACRAO Paid Dues \$ 1,701,951.00 \$1,723,996.41 \$1,755,854 \$1,831,564.74 \$1,992,754 \$2,096,724 \$2,253,434 \$2,322,132

Corporate Paid Dues \$ 104,537.50 \$108,125.00 \$143,150 \$145,300.00 \$129,850 \$142,003 \$131,120 \$146,165

Year-to-Date

% of Institutional Membership Paid 97% 95% 96% 97% 97% 95% 97% 96%

% of Budget Met – Institutional 100% (Increase 1%)

100%

(Increase 1%)

100%

(Increase 5%)

100%

(Increase 12%)

100%

(Increase 7%)

100%

100%

Prior Year-to-Date

% of Membership Paid Prior YTD 94% 97% 95% 96% 97% 97% 95% 97%

4.) Analysis – Corporate

% of Corporate Renewals 97% 80% (12% - not paid)

88%

(24% - not paid)

76%

(\$40,000 – 30%

- not paid) 70%

(20% - not paid)

80%

(\$20,975 – 16% -

not paid) 84%

% of Budget Met – Corporate 108% 132% (Increase 2%)

102%

(Decrease 10%)

90%

(Increase 4%)

104%

(Decrease 8%)

92%

(Budget =

\$172,636) 85%

% of Corporate Paid Prior YTD 100% 97% 80% 88% 76% 70% 80%

*42 Affiliate Members became Institutional Members

** Includes 12 Reciprocal Individuals

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Year-End Comparison: 2000-2007

The above table compares the membership renewal totals for the last eight years. Of note, institutional and individual memberships have continually increased. While the number of corporate members decreased due to an increase in dues in 2005-2006 and stricter membership requirements, the total revenues increased in 2005-2006.

6215 RETENTION AND RECRUITMENT

Potential Members from Phone Calls and Emails

We are currently working with the following institutions/individuals who contacted us directly via phone or email from April to June 2008 regarding AACRAO membership. We are following up with each inquiry within two weeks after the initial membership request. We are receiving an average of 15-20 inquiries per month.

Date

First

Name Last Name Title Institution

Jun-08

6/5/2008 Leslyne

Johnson

Morgan Admissions Officer Caribbean Maritime Institute

6/9/2008 Jessica Newberry

6/9/2008 Jaclyn Rodemann Director of Admissions & Recruitment Ocean County College

6/11/2008 Jeanne Ruane Registrar Scranton University

6/11/2008 Wanda Sarr Registrar Ouachita Hills College

6/11/2008 Patrick Simmons Columbia College

6/18/2008 Cathy Day Registrar Carroll College

6/19/2008 Anita Cunningham Admissions Coordinator John's Hopkins University - School of Medicine

6/19/2008 Nadia Henwood Coordinator, Admissions and Transfers Lethbridge (Community) College

6/19/2008 Marlies Overbeek International Marketer Delft University of Technology

6/19/2008 Kathryn Prouty Dir. of Int'l Recruitment & Admissions Brandenburg University of Technology Cottbus

6/19/2008 Andrea Wawrzusin Univ of South Carolina, Beaufort

6/24/2008 Dawn Hougland Assistant Director Roosevelt University

6/24/2008 Mary Haggarty International Admissions Coordinator University of Guelph

6/25/2008 Ariel Geva Managing Director Technion Israel Institute of Technology

6/25/2008 Jamal

Abdullah

Buhlaigah

Interim Director, Human Resources

Information King Abdullah Univ. of Sci & Tech (KAUST)

May-08

5/6/2008 Gina Lepore Chief Operating Officer Pacific College of Oriental Medicine-NY

5/6/2008 Ann Beiderbecke Registrar Northwest Lineman College

5/15/2008 Janice Stephens Registrar Central Alabama Community College

5/29/2008 Adrienne Gallien Registrar Robert E Lee High School

Apr-08

4/1/2008 Debra Mattison Registrar Hazelden Grad School of Addiction Studies

4/3/2008 Debra Oliver Registrar Maric College - North County

4/3/2008 Rochelle Hopkins College Registrar Montgomery College

4/4/2008 Tyrone Tindell Assistant Director of Admissions Johnson & Wales University - Charlotte

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4/4/2008 Laurie Buck Colorado State University - Global Campus

4/4/2008 Jeff Arthur VP Information Systems & Financial Aid ECPI College of Technology

4/8/2008 Carlene Wilson Registration Manager Johns Hopkins University

4/10/2008 Jackie Hutchings Registrar Southern California Univ of Health Sciences

4/10/2008 Susie Butler Assoc. Director of Enrollment Services Baton Rouge Community College

4/10/2008 Cristina Coronado Coordinator of Administration Southern Methodist University

4/10/2008 Melissa Whetzel News Manager College of Charleston

4/14/2008 Linda Racine Director, Health Services Lincoln University
4/14/2008 Donna King Director of Financial Aid Grayson County College
4/15/2008
Sarah
Marie Livingston Human Resources Generalist College of Saint Mary
4/21/2008 Charlotte Rhine Registrar Florida Int'l Univ School of Medicine
4/22/2008 Juan Alexander Director of Admissions Alabama A&M University
4/22/2008 Marty Felgen Director of Admissions Antioch University - Los Angeles
4/22/2008 Janice Lamoureux Registrar Fanshawe College
4/24/2008 Gregory Thomas
4/24/2008 Janet Stratcher Registrar East Georgia College
4/24/2008 Donna Luke
Office of Admissions, Records, &
Research East Central Community College
4/28/2008 Rosita Capelle Director, Admissions and Records College of the Marshall Islands
4/29/2008 Naomi De Winter Dean of Student Services North Central Michigan College

Southern ACRAO Annual Meeting – January, 2008

Membership information sent to the following 25 non-member institutions that attended the 2008

SACRAO Annual Meeting:

Athens State University
Bangor University Wales UK
Bishop State Community College
Copiah-Lincoln Community College
Cumberland University
DeVry University – Alpharetta, GA
Elizabeth City State University
Faulkner University
Forsyth Technical Community College
Glasgow Caledonian University
Hampden-Sydney College
Hazard Community & Technical College
Henderson State University
Hinds Community College
Jefferson Community & Technical College
King's College London
Methodist University
Nicholls State University
Northwest Mississippi Community College
Ozarka College
Piedmont College
Southern Arkansas University
Southwestern Oklahoma State University
Tri-County Technical College
University of Surrey, Guildford

Registrar 101 online

Membership information was sent to the following 4 non-member institutions that attended the

Registrar 101 online course:

Intellitec Medical Institute
Leech Lake Tribal College
Quest University Canada
Xavier University of Louisiana

Carolinas ACRAO Annual Meeting – November, 2007

Membership information was sent to the following 26 non-member institutions that attended the CACRAO Annual Meeting:

Claflin University
Coastal Carolina Community College
Elizabeth City State University
Forsyth Technical Community College
James Sprunt Community College
Johnston Community College
Lenoir Community College
Mount Olive College
North Greenville University
Pamlico Community College
Pitt Community College
Queens University of Charlotte
Robeson Community College
Rowan-Cabarrus Community College
Sampson Community College
South Carolina Student Loan Corporation
St. Augustine's College
Technical College of the Lowcountry
Tri-County Technical College
University of South Carolina at Beaufort
University of South Carolina at Lancaster
University of South Carolina at Salkehatchie
Wayne Community College
Williamsburg Technical College
Wilson Technical Community College
Winston-Salem State University

As a result of this mailing, Queens University of Charlotte and Winston-Salem State University joined

Department of Defense Registrars' Community of Practice Meeting – October, 2007

Membership information was sent to the following 13 non-member institutions that attended the Department of Defense Registrars' Community of Practice meeting:

Army Logistics Management College
Army Medical Department Center & School
Asia-Pacific Center for Security Studies
Command and General Staff College

DoD Civilian Personnel
Management Service
Defense Intelligence Agency
Defense Security Service Academy
DoD Privacy Office
George C. Marshall Center -
Garmisch Germany
Inter-American Defense College
Joint Counterintelligence Training
Academy
National Geospatial-Intelligence
College
Navy Medicine Manpower,
Personnel, Training and Education
Command

As a result of this mailing, Army Logistics Management College joined.

17th Annual Strategic Enrollment Management (SEM XVII) Conference, October 28 – 31, 2007

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Membership information was sent to the following 21 non-member institutions that attended the 2007 SEM conference:

Assiniboine Community College, Canada
Bellevue Community College, WA
Cascadia Community College, WA
Gulf Coast Community College, FL
Hazelden Graduate School of Addiction Studies, MN
Hinds Community College, MS
Intellitec Medical Institute, CO
Inter American University of Puerto Rico Inc, PR
Leech Lake Tribal College, MN
Lincoln Land Community College, IL
Mississippi Gulf Coast Community College, MS
Nunez Community College, LA
Oregon College of Oriental Medicine, OR
Penn State World Campus, PA
Quest University Canada, Canada
Red River College, Canada
South Arkansas Community College, AR
University of Akron Wayne College, OH
University of South Australia, Australia
Woodland Community College, CA
Xavier University of Louisiana, LA

As a result of this mailing, Gulf Coast Community College and Financial Aid Services Inc. joined.

Managing for Outcomes Webinar, September 19, 2007

Membership information was sent to 12 non-member individuals (including 3 from non-member institutions) that attended the “Managing for Outcomes: Shifting from Process-Centric to Results-Oriented Operations” Webinar. The following are the 3 non-member institutions that attended:

California University of PA
Rock Valley College, Rockford, IL
Northeastern State University, OK

As a result of this mailing, California University of PA joined.

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RESEARCH

6220 RESEARCH

AACRAO regularly conducts surveys of the membership in order to provide data on common practices and to better gauge internal performance. The following surveys were conducted this quarter:

SIS, Degree Audits, and NCAA Compliance Reporting*

Identity Management*

Board of Directors Self-Survey

Academic Progression*

Annual Meeting Feedback Survey

**Data made available to the membership through AACRAO Transcript and AACRAO.org.*

The following surveys are currently being prepared for the upcoming quarter:

Ethics

Academic Competitiveness / SMART Grants

Tech Conference Follow Up

MEETINGS AND WORKSHOPS

6300 REGISTRAR 101

Two site based workshops were budgeted for this year. One in connection with the SEM Conference last fall in New Orleans and one stand alone held in Chicago, IL July 18-19, 2008.

In 2008/09 a site based workshop will be held in conjunction with the SEM Conference in Anaheim, CA, November 19-20.

The National Student Clearinghouse will not sponsor these workshops in the future, as they have in the past, due to our decision not to allow a presentation by them concerning "outsourcing" that has consistently been ranked low by attendees. We are confident that we will attract a new sponsor for this workshop and have already found a new opportunity for the Clearinghouse to every ones satisfaction.

6305 SEM CONFERENCE

The 18th Annual SEM Conference will be held in Anaheim, California, November 16-19, 2008 at the Anaheim Marriott Hotel. The registration brochure for the meeting is scheduled to mail in late August.

Marketing efforts began in October for this meeting. The SEM '08 Corporate Opportunities Brochure was distributed in New Orleans, along with the Corporate Opportunities Brochure for our other meetings, our new Advertising Brochure, and our corporate partner application.

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We will make every effort to contact past and current exhibitors though emails, printed materials, and face-to-face visits on-site to encourage them to participate in the following year's show as well as the 2009 Annual Meeting and Technology Conference.

For SEM 2008, we have already secured twenty exhibitors:

- Education Systems (EMAS Pro)
- Rapid Insight
- James Tower
- NRCCUA
- ImageNow
- Talisma
- SunGrad Higher Education
- Scrip-Safe International
- Jenzabar, Inc
- Innovation Ad
- BookWear

- College Source, Inc.
- Azorus
- Plattform Advertising
- Royall & Company
- Datatel
- Hobsons
- AACRAO Consulting
- Connect EDU
- Eduventures, Inc.

Corporate presentations at the SEM Conference will be given by:

- Datatel
- ImageNow
- Noel-Levitz
- The Princeton Review
- Hobsons
- SunGard Higher Education
- College Source
- Royall & Company
- SAP Public Services
- Maguire Associates

The following companies are participating as sponsors at the SEM Conference:

- Datatel – Totebags
- ImageNow – Badge Holders
- College Source – Onsite program
- SunGard Higher Education – Transition

Screen

- EMAS pro – Event Signage
- SPSS – Cyber Café
- National Student Clearinghouse – Reg

101 Workshop

Ads from the following companies are scheduled to appear in the SEM Onsite Program:

- SPSS
- CollegeSource
- AACRAO Consulting
- EMASPro
- ImageNow
- Datatel

We will be sending e-mails and contacting current exhibitors and prospective participants to recruit new exhibitors, garner sponsorships, and sell advertising.

The 19th Annual Strategic Enrollment Management (SEM) Conference will be held at the Hyatt Regency Dallas Hotel, Dallas, Texas November 8-11, 2009.

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6320 FERPA WORKSHOPS

We held one FERPA Workshop in conjunction with the stand alone Registrar 101 Workshop in Chicago, IL. It appears to have broken even on an overall basis. We will explore holding one in conjunction with a future Registrar 101 Workshop and one as a webinar. We will continue to have FERPA sessions at the Technology Conference and the Annual Meeting.

The following Annual Meeting FERPA sessions have been submitted for upcoming Annual Meeting in Chicago:

- Campus Safety and FERPA - Responding in Emergencies
 - Ethics Training On-line
 - Federal Compliance 101
 - Federal Compliance Overview
 - FERPA 101: The Short Version
-

- FERPA Q & A panel/round table discussion
- FERPA Roundtable
- FERPA: Beyond the Basics
- FERPA: What You Need to Know - The "Overview"
- FERPA: What You Need to Know - The "Update"
- How to Train Your Faculty, Staff and Administration on FERPA: It Can be Done!
- Human Subjects Review Committees and Inadequacies of FERPA
- Legal Issues and Resources for Small-College Registrars
- Legal Issues in Records and Registration
- Putting Student Record Information At Parents' Fingertips
- Roundtable: Data Requests
- Student Workers: Access to Data, the Need to Know and Conflict of Interest
- WebXpress for Parents - Helping Those Helicopter Parents Land!

The following FERPA sessions were presented at the Technology Conference:

- FERPA Update with Leroy Rooker
- Privacy and Security Considerations for Student Information

6325 TECHNOLOGY CONFERENCE

The 2008 AACRAO Technology Conference was held July 10-12 at the Baltimore Marriott Waterfront Hotel. AACRAO continued its "greening" efforts at the Technology Conference by printing the onsite program on recycled paper and supplying attendees with re-usable sports bottles that they can keep filling with water at the meeting.

Registration for this year's Technology Conference was down from last year. As of 8th of July, 416 participants were registered for the conference. Last year, there were a total of 533 participants which included 39 people that registered at the conference.

The following 31 companies exhibited at Tech '08:

- Miami University DARS
- National Transcript Center
- National Student Clearinghouse

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- Runner Technologies
 - Rapid Insight
 - CollegeNet
 - Docufide
 - Leepfrog Technologies
 - Blackbaud
 - CollegeSource
 - Hobsons
 - Smart Catalog
 - Texas Digital
 - Image Now
 - Scrip-Safe
 - Talisma
 - SNTial Technologies
 - QAS
 - Intelliworks
 - Hyland Software
 - Nolij
 - EMAS Pro
 - Xap
 - Overture Technologies
 - Credentials
-

- Avow Systems
- Hershey Systems
- SSD Technology
- SPSS
- Connect-ED
- AACRAO Consulting

We sold twelve corporate presentations for Tech '08:

- Runner Technologies
- College Source
- Smart Catalog
- Image Now
- Talisma
- Intelliworks
- Hobsons
- Hyland Software
- Hershey Systems
- Credentials
- SPSS
- AACRAO Edge

The following sponsors participated in the Technology Conference:

- Datatel – Totebags
- ImageNow – Badge Holders

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- EMAS Pro – Event Signage & Onsite Program
- College Source – Transition Screen & Opening Reception
- SPSS – Cyber Café

The following ads were placed in the Tech onsite program:

- ImageNow
- National Student Clearinghouse
- Datatel
- EMASPro
- College Source
- SPSS
- Chronicle
- Inside Higher Ed
- Greentree Gazette
- Diverse
- AACRAO Consulting

The 2009 AACRAO Technology Conference will be held at the JW Marriott Starr Pass Resort & Spa in Tucson, Arizona, July 19-21. We have created a corporate opportunities brochure for Tech '09, which was distributed in Baltimore, along with information on our other meetings and information on advertising and corporate membership.

The 2011 AACRAO Technology Conference will be held at the Grand Sierra Resort in Reno, Nevada, July 10-12 (Sunday – Tuesday). This contract was negotiated as a way to eliminate the cancellation penalty for the 2011 Annual Meeting that was originally contracted with this hotel.

6350 DISTRIBUTIVE LEARNING

Online courses – Sessions and enrollments for CY 08

So far in calendar year 2008, we have presented two sessions of Managing the Registrar's Office, two sessions of Admissions Manager 101, and one session of Registrar 101, with a session of Admissions Counselor 101 coming up in January 2009 (the fall is not a good time to offer counselor workshops!).

Registrations have been strong for Admissions Manager 101 (22 for the Feb. 4-29 offering and 22 for the June 2-27 offering), and very strong for the Registrar offerings: 36 for Registrar 101 (Jan. 28-Feb. 23) and 34 and 39 for Managing the Registrar's Office (Feb. 11-Mar. 8 and June 2-27). As mentioned in previous reports, these figures are particularly outstanding, because we normally hold registration to 35 so as not to overwhelm faculty with postings, each of which normally receives an individualized response from a faculty member.

Sample Student Response

This is a sample of an evaluative response received by Don Bunis for his online workshop, created and taught by him, on "Managing the Registrar's Office":

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I was hesitant to register for this online course. I thought navigating the software would be a chore (it was a breeze) and I feared I would not have the time required. But the class was so good that I was motivated to make the time. I just kept coming back for more – what was the next set of readings going to reveal about a current issue in my office?

With no budget for travel and with the excellent experience I had with this on-line course, I will be interested in taking others that deal with management/leadership issues and with topics of special interest to Registrars: FERPA, etc. I will continue with reading, reading, research, research."

We have similar high praise from participants in the other workshops.

Next online workshops planned for CY 08

January 2009 – Admissions Counselor 101

February 2009 – Admissions Manager

February 2009 – Managing the Registrar's Office

Late April/early May – Admissions Counselor 101

June 2009 – Admissions Manager

Fall 2009 – Managing the Registrar's Office

Plus two more sessions of Registrar 101 (exact dates to be determined)

6375 TRANSFER CONFERENCE

We have currently offered the Director position for the 2nd Annual AACRAO Transfer Conference to Lee Furbeck, Associate Director of Admissions and Scholarships, University of Kansas, and she has accepted the position. We had recently developed the meeting specifications and we are looking for city and hotel sites. We hope to attract at least 250 registrants to this meeting.

The conference addresses the transfer of academic credit, a complex feature of American higher education. The United States offers the greatest degree of inter-institutional student mobility and has the most extensive system of portability of academic credit in the world. Obstacles to seamless transfer persist however and occasionally result in state or federal efforts to force political solutions to a fundamentally academic problem. AACRAO intends to explore the voluntary, community-wide methods of facilitating transfer and to develop principles of best practices that members can use as guidelines for handling transfer issues.

6385 IDENTITY MANAGEMENT

On July 9-10, 2008, in conjunction with the AACRAO Technology Conference, AACRAO partnered with EDUCAUSE and Internet2 to host a workshop on "Identity Management: Moving Your Institution Forward."

The purpose was for registrars and IT staff to work together to explore multi-institutional strategies for managing identity management on college campuses. There were over 85 registrants. The sponsor was National Student Clearinghouse. The Identity Management Planning committee will be meeting to review the results of the discussion and plan the next steps. We will continue to work with EDUCAUSE and Internet2. Clearinghouse would like to continue their involvement.

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6390 WEBINARS

Webinar on Transfer Credit Evaluation – Was held on Wed., Oct. 17, 2007, with Lee Furbeck (Associate Director, Admissions and Scholarships, University of Kansas); Tina McEntire-Mason (Director of Undergraduate Admissions, University of North Carolina, Charlotte); and Seth Kamen (Director, Office of Community College Relations, University of Baltimore). Wanda Simpson, Vice President for Records and Registration, mentioned at the outset that we have Transfer Credit Practices (TCP) available online and now again in print, for the first time in six years. She also mentioned that we are always looking for Reporting Officers. This Webinar attracted well more than 200 paid registrants, thus showing that there is great interest among AACRAO members in transfer matters.

PUBLICATIONS

6400 GENERAL PUBLICATIONS

The top five best-selling titles for the current 2007-2008 fiscal year which started on October 1, 2007, starting with the most popular, include:

- *The College Admissions Officer's Guide*
- *The Registrar's Guide*
- *The FERPA Guide*
- *The Basic Guide to Enrollment Management*
- *Managing for Outcomes*

The following are the latest publications released by AACRAO with brief descriptions and sales information. The listing starts with the newest publication:

The Educational System of the Russian Federation

This guide on the educational system of Russia was released April 30, 2008 for the 2008 NAFSA Conference (May 25-30, 2008) in Washington, DC. Edited by Chris J. Foley, Director of Admissions, Indiana University-Purdue University Indianapolis, the guide combines reports from the Joint Russian Federation/U.S. Commission on the Mutual Understanding of Education with additional and updated content. In the first month of sales, 56 copies were sold.

The College Admissions Officer's Guide

AACRAO's first comprehensive guide to the admissions officer's profession in a decade, *The College Admissions Officer's Guide*, was released March 18, 2008 for the 2008 Annual Meeting in Orlando (March 24-27, 2008). Edited by AACRAO's Associate Director of Research, Barbara Lauren, Ph.D., J.D., it features 56 contributing authors and 44 chapters. It is similar in length and format to the Registrar's Guide. As of May 30, 2008, 475 copies have sold.

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The SEM Imperative: Taking Enrollment Management Online

This SEM publication was released October 24, 2007 in time for the SEM Conference and was authored by Craig Westman, Ph.D. and Penny Bouman along with 19 contributing authors. *The SEM Imperative: Taking Enrollment Management Online* demonstrates how higher education can create content, tools, and experiences to connect with the Gamer audience and build relationships in an Internet-driven world. As of May 30, 2008, 210 copies have sold.

Managing for Outcomes: Shifting from Process-Centric to Results-Oriented Operations

This guide was released July 26, 2007 and was authored by Wayne Sigler, Ed.D. It presents the Outcome-Oriented Operations (Tri-O) Management System, a coordinated leadership/management system that enables organizations to thrive by consistently delivering specific, measurable outcomes that are expected and valued by key stakeholders. As of May 30, 2008, 464 copies have sold.

Academic Dishonesty: Developing and Implementing Institutional Policy

This overview of academic dishonesty was released on June 12, 2007. Drawing heavily from current literature, case law, and a survey of fifty-two North Park University (Chicago) faculty members, author Dennis Bricault, Ph.D analyzes the legal issues affecting academic misconduct and provides guidance for assessing and restructuring institutional policies and procedures. As of

May 30, 2008, 560 copies have sold.

The Educational System of France

The Educational System of France is a guide for United States admissions officers to the structure and content of the educational system of France. The book was released for the 2007 NAFSA Conference (May 29- June 1, 2007) in Minneapolis, and as of May 30, 2008, 174 copies have sold.

The Impact of Bologna and Three-year Degrees on U.S. Admissions: A Focus on Europe, Australia and the United Kingdom

This monograph captures the presentations and discussions among participants from a November 2006 symposium on how to develop admissions policies regarding international applicants with three-year bachelor's degrees. It was released March 13, 2007, and as of May 30, 2008, 350 copies have sold.

Accreditation Mills

The book was released March 6, 2007 and was authored by Allen Ezell. It gives a historical perspective of the accreditation mill problem, defines tactics used by mills to deceive the public, and explains how readers can take an active role in the fight against them. As of May 30, 2008, 237 copies have sold.

Community Colleges and Student Information Systems Implementation: A Survey on the Registrar's Role

The book was released on November 22, 2006. Based on a dissertation submitted by Sandy Lepley, it utilizes the findings of a survey to report the ways in which systems implementation has affected the perceived role of the community college registrar. As of May 30, 2008, 67 copies have sold.

Electronic Database for Global Education (EDGE)

EDGE became available for subscription on November 2, 2006 featuring 40 country profiles. Since its release, an additional 94 profiles have been added, making the current total 134. This electronic resource provides easily accessible up-to-date information on foreign educational systems. In November 2007, subscription renewals began and will continue throughout the year 38

as memberships expire. As of June 30, 2008, 372 institutional subscriptions have been purchased, totaling 853 individual users. A total of 62 EDGE authors have been paid an honorarium of \$300 each for a total of \$18,600. Bill Paver currently employs a half-time writer/editor for EDGE (Kathleen Trayte) and funds biannual EDGE committee meetings.

FERPA Quick Guide

The FERPA Quick Guide was released September 21, 2006, with a preface given by Dennis Hicks. Designed to give staff members key facts on their role in FERPA compliance, this short publication provides a basic overview of the Family Educational Rights and Privacy Act of 1974, as amended, and the full text of its regulations. As of May 30, 2008, 912 copies have sold.

Gamers Go to College

Gamers Go to College illustrates how Gamers create and demand a convergence of technology in higher education. The publication's overarching theme highlights the vital role communication plays and the varying venues that are at higher education's disposal in light of the Gamers generation. The book was released in time for the AACRAO Technology Conference in July 2006 and as of May 30, 2008, 379 copies have sold.

Transfer Credit Practices of Designated Educational Institutions (TCP) 2006

Transfer Credit Practices of Designated Educational Institutions (TCP) 2006 was released in July 2006, and presents a voluntary exchange of information regarding practices for acceptance of transfer credit. This publication reports the transfer acceptance practices of one major institution in each state regarding credit awarded by other colleges and universities in that state. As of May 30, 2008, 1,187 copies have sold.

WORKS IN PROGRESS

Campus Visits

This quick guide will be a how-to on effective campus visit programs and the notion of creating an authentic experience for college visitors. Authors Craig Westman, Ph.D. and Penny Bouman were sent contracts in February 2008. The final text is tentatively scheduled for September 1, 2008.

Central Asia

Chris Foley submitted an application in May 2005 for a publication on Central Asia with four contributing authors – Chris Foley, Erik Johansson, Ann Koenig and Ted McKown. The first contract was sent to Chris in June 2005. A revised contract including additional author Botir Djuraev was sent on to Chris on October 31, 2005. The contract was signed and the final text is due in the Fall of 2008.

Community College Issues

Two guides will cover current issues in community colleges. The first will focus specifically on SEM in community colleges, addressing strategic issues in this newly emerging area. The second will focus on the unique dynamics of enrollment services functions/processes in the community college setting, aimed at community college registrars, admission officers, and technology specialists. Bob Bontrager, Director of AACRAO Consulting Services, will serve as editor of both publications, beginning with the SEM Issues guide, which is tentatively scheduled for publication in April of 2009.

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Counterfeit Diplomas and Transcripts - Are Your School's Transcripts for Sale?

In this publication, author Allen Ezell will overview the world of counterfeit documents and will help educators use legal and technological tools to thwart participants in the industry. A contract has been signed, and we have authorized \$1,800 in research expenses for the author. The guide is at press and is scheduled for release on July 22, 2008.

Electronic Data Exchange Publication

This short guide gives guidance to potential Electronic Data Exchange Implementers, and is authored by the outgoing chair of SPEEDE committee, Monique Snowden and current member Claire Smith-Larson. It is scheduled for publication in the Fall of 2008.

Ethics Book

The Ethics Taskforce consisting of Mike Allen, Tim Amyx, Elliott Baker, Michele Forbes, Polly Griffin, Betty Huff, Art Leak, Paul Aucoin and chaired by Dennis Hicks will meet on July 25, 2008. The results of their findings will be published in a short guide and is tentatively scheduled for release at the 2009 annual meeting.

Second Time Around - Systems Implementation

Sharon Cramer, the author of *Student Information Systems* is interested in authoring a short guide on implementing a new system. This guide will target institutions which are planning a second systems implementation, and will focus on new issues and procedures arising the second time around. It will include recommendations from campuses that have made second implementations or significant upgrades to their current system. The guide is tentatively scheduled for Fall 2008.

Solomon Amendment Brochure

An update of the Solomon Amendment brochure will serve as a guide for recruiters and student records managers. It will be edited by Barbara Lauren and Elliott Baker, and is scheduled for publication in Spring 2009.

The Paradox of Strategic Enrollment Management: Student Access and Institutional Financial Outcomes

This SEM book will focus on finance, will be edited by Bob Bontrager and contain chapters by contributing authors Gil Brown and Don Hossler. Chapter topics and titles as well as the book title are in progress. A final draft was delivered on June 25, 2008, and the publication is scheduled for release at the SEM Conference in November 2008.

AACRAO BOOKSTORE

Most recently, AACRAO sold a total of \$36,770 in publications at the AACRAO Annual Meeting in Orlando, Florida, March 24-27, 2008.

Annual Meeting Day 1 Day 2 Day 3 Day 4 (1/2 day) Total Rev.

Orlando 2008 \$8,088 \$12,827 \$12,694 \$3,160 \$36,770

Boston 2007 \$7,209 \$10,674 \$10,204 \$2,363 \$30,452

San Diego 2006 \$24,174 \$21,929 \$20,917 \$7,372 \$74,394*

New York 2005 \$4,628 \$10,027 \$11,319 \$7,956 \$33,932

Las Vegas 2004 \$10,421 \$12,600 \$10,482 \$5,113 \$38,618

Washington, DC 2003 \$6,938 \$11,058 \$7,322 \$4,283 \$29,602

**Released Registrar's Guide, 2006 FERPA Guide and United Kingdom*

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NAFSA Conference Total Revenue

Washington DC 2008 \$5,920

Minneapolis 2007 \$6,278

Montreal 2006 \$7,592

Seattle 2005 \$3,420

Baltimore 2004 \$6,000

Salt Lake City 2003 \$2,500

San Antonio 2002 \$10,000*

**PIER book sale was held.*

Technology Conference Total Revenue

Minneapolis 2007 \$2,043

Denver 2006 \$2,300

Atlanta 2005 \$1,365

Newport Beach 2004 \$385

SEM Conference Day 1 Day 2 Day 3 Day 4 (1/2 day) Total Revenue

New Orleans 2007 \$ 1,155 \$ 4,405 \$ 4,825 \$ 2,520 \$12,905

Phoenix 2006 \$ 940 \$ 3,252 \$ 3,797 \$ 2,085 \$10,075

Chicago 2005 \$ 4,605 \$ 7,426 \$ 6,199 \$ 1,246 \$19,477

Orlando 2004 \$ 1,939 \$ 2,489 \$ 4,183 \$ 2,637 \$11,209

In February 2008, a column titled "Relevant AACRAO Publication" was added to the sessions listings of the 2008 Annual Meeting program, allowing attendees to view related publications (if any) as part of session information.

MARKETING AND ADVERTISING

Our marketing efforts have yielded positive results, evidenced by our record sales and consistently low number of book returns. The low number of book returns is direct proof that our advertising has been accurate and well-received.

- Sample AACRAO publications were exhibited at the following meetings:

- o Colleges Ontario Connections SEM Conference in Ontario, June 5, 2008

- o NAFSA Conference in Washington, DC, May 25-30, 2008

- o NAGAP - 21st Annual Conference in Denver, CO, April 30 - May 3, 2008

- o AACC Annual Convention in Philadelphia, April 5-8, 2008.

- o NACAC Legislative Conference in Washington, DC, March 9-12, 2008

- Review copies were given to the following journals and associations:

- o In April 2008, review copies of the *College Admissions Guide*, *SEM Imperative*

and *Managing for Outcomes* were sent to Rachael Groseclose, Editor of

NACAC's Journal of College Admission and book reviews. Book reviews are

posted online, and NACAC members are encouraged to submit reviews online.

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- o In April, Don Hossler was sent a copy of *The College Admissions Officers Guide* for review in College Board's Enrollment Management Review.

- o In June, review copies of *Academic Dishonesty*, *France*, *SEM Imperative* and *Accreditation Mills* were sent to Jane Erskine, Editor of Book News, Inc's quarterly Reference and Research Book News Journal. It has a readership of 1500 college librarians. Her reviews are also on several websites and databases which include EBSCO, ProQuest, Books in Print with Reviews On Disk, and Powells.com.
- Desk copies were given to the following individuals at their request:
 - o Desk copy of *Certification of Students under Veterans' Laws* was sent to Edgar Hall, Army Education Counselor at Fort Stewart, Georgia.
- In recent issues of *SEM Source*, the following publication has been featured:
 - o *The College Admissions Officer's Guide* (May 2008)
- In recent issues of *Memberlink*, the following publications advertisements have been included:
 - o Gen Xers Return to College
 - o The Registrar's Guide
 - o The Educational System of Russia
 - o The Educational System of United Kingdom
 - o The College Admissions Officer's Guide
 - o Basic Guide to Enrollment Management
- Four publications advertisements were featured in the Summer 2008, vol. 83:4 edition of C&U Journal: In Print (*Registrar's Guide* and *College Admissions Officer's Guide*), Complete SEM Solution (half page), EDGE (full page), and Smart Catch (General pubs, full page color).
- In March 2008, publication inventory was reduced and consolidated in an effort to decrease storage costs at our distribution center.
- In March 2008, an author discount was given to Terry Labandz, Bookstore Supervisor at University of Minnesota, on 5 copies of *Managing for Outcomes*
- In May 2008, *Managing for Outcomes* was given a short review in the Reference & Research Book News (May 2008) online catalog.
http://www.booknews.com/ref_issues/ref_may2008/aacr1.html
- In June 2008, a half-page advertisement was placed in Forum Magazine, published by European Association for International Education. The three publications featured were: *College Admissions Officer's Guide*, *France* and *The Impact of Bologna and Three-Year Degrees*, and the ad was placed at no cost to AACRAO.
- An exchange agreement with ACE was reached in which AACRAO included a full-page advertisement for ACE's AIPE directory in our 2008 annual meeting program, and in return ACE will include an AACRAO publications advertisement in the upcoming edition of *The President* magazine.

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- AACRAO is donating its most recent publications to the ACE library for inclusion in their catalog and for use by patrons of the library. ACE will include AACRAO publications in its monthly list of new acquisitions distributed to all the higher education associations at One Dupont Circle. This service is free.

PERMISSION GRANTED

- In April 2008, Tom Mahon, University Registrar at American National University, was given permission to use *FERPA Guide* training documents from the accompanying CD to train university staff.
- In May 2008, XanEdu was granted permission on behalf of Capella University to include Chapter 7 of *Strategic Enrollment Management Revolution* in a digital CoursePack for approximately 10 students enrolled in ED7611 during the Summer 2008 semester.

XanEdu posted the material on a password-protected Web site at www.xanedu.com. Only the instructor and students registered for this course have access. The material will be removed at the end of the semester.

6430 TCP PUBLICATIONS

Transfer Credit Practices of Designated Educational Institutions (TCP) 2006 was released in July 2006, the first print copy in 8 years. AACRAO has established this voluntary medium of information exchange for over 70 years, in order to provide crucial information to colleges and universities to determine their own transfer credit practices. The online version continues to be available to members at http://www.aacrao.org/users_only/TCPForm/.

An on-going effort to recruit new reporting officers has yielded a total of 31, ten of which have completed their reporting in the TCP database. As a result of our efforts to recruit the top 20 two-year colleges, the following nine two-year colleges have volunteered to report for TCP:

1. Broward Community College, Florida
2. Salt Lake Community College, Utah
3. Monroe Community College, New York
4. Suffolk County Community College, New York
5. Santa Fe Community College, Florida
6. Houston Community College System, Texas
7. Montgomery College, Maryland
8. CUNY Borough of Manhattan Community College
9. CUNY Queensborough Community College

On June 8, 2007, an e-mail was sent to all 85 TCP reporting officers requesting that they update their state's credit practice information. A follow-up email was sent on February 5, 2008, reminding reporting officers to update information by March 31, 2008.

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6450 ELECTRONIC DATABASE FOR GLOBAL EDUCATION (EDGE)

In the current year, our net profit for this project is \$17,860. Bill Paver currently employs a halftime writer/editor for EDGE (Kathleen Trayte), and funds biannual EDGE committee meetings.

Year AACRAO Expense Revenue

2004/2005 \$11,123 \$0

2005/2006 \$27,486 \$21,075

2006/2007 \$53,018 \$47,669

2007/2008 (as of May 31, 2008) \$30,942 \$48,802

Total \$122,569 \$117,546

EDGE became available for subscription on November 2, 2006 featuring 40 country profiles. Since its release, an additional 94 profiles have been added, making the current total 134. This electronic resource provides easily accessible up-to-date information on foreign educational systems. In November 2007, subscription renewals began and will continue throughout the year as memberships expire. The fee for the second year increased \$100 for member and non-member institutions.

As of July 2, 2008, 372 institutional subscriptions have been purchased, totaling 853 individual users compared with 276 institutions and 629 individuals in November, 2007. A total of 62 EDGE authors have been paid an honorarium of \$300 each for a total of \$18,600.

The EDGE Database was demonstrated to members at the 2008 Annual Meeting and the 2008 NAFSA Conference allowing for on-site registration. EDGE was also demonstrated for several divisions of Homeland Security and as a result, 47 DHS employees have subscribed to EDGE as a test for possible subscriptions for all Immigration Adjudicators. In addition, discussions have begun with the US Department of Labor as to their possible enrollment in EDGE. An EDGE user survey was distributed to all users in October 2007.

6530 COMPLIANCE

The College Admissions Officer's Guide

This companion volume to The Registrar's Guide was published in time for AACRAO's Annual Meeting in Orlando in March 2008. The book has sold 475 copies so far.

Combined on-site Registrar 101 and SEM, July 17-18, 2008

Three Registrars will be the presenters: Glenn Munson (Rhodes College), Brad Myers (Ohio State University) and Kathie Beaty (Bradley University). The Registrar 101 workshop will be a 1 ½ day session, Thursday, July 17 and the morning of July 18. The FERPA session will then follow on Friday afternoon. The two workshops can be signed up for separately, but the great majority of people are taking both. We will have at least 50 people signed up for both; final figures may be higher.

AACRAO staff is coordinating receipt of substantive materials and preparation of the workbooks, which include an unprecedented seven modules for one workshop: The Role of the Registrar; The Registrar and Academic Policy; Advice to New Registrars; Making Your Campus FERPA Compliant; A Semester in the Life of a Registrar: Nuts and Bolts; and Information Sources for

44 Registrars. Generous amounts of time are programmed in on both days for student-initiated discussion and comments on issues arising from their daily work.

GOVERNMENT RELATIONS/COMMUNICATIONS

6505 GOVERNMENT RELATIONS

Legislative Developments

Congress is still bogged down in its 10-year effort to reauthorize the Higher Education Act of 1965, which is now—for the thirteenth time—temporarily extended to July 31, 2008.

The House and the Senate are still in negotiations over outstanding provisions of each chamber's respective bill, a task made significantly more difficult by Senator Kennedy's illness and absence from member-level discussions while receiving treatment. Of the issues that have the greatest impact on AACRAO—transfer of credit, data reporting, voter registration, diploma mills and provision of textbook pricing information by pre-registration—only the latter topic remains in flux. Transfer appears to have been settled in favor of institutional autonomy, while an enormous increase in the number of data elements in IPEDS and additional disclosure are a foregone conclusion. It is likely that some language on diploma mills will be included in the final bill. Also on the plus side, the new bill would modify the current voter registration mandate to allow for full compliance through dissemination of electronic forms and links to such forms. Some language on disclosure of textbook titles and prices will almost certainly be included in the final bill, but the House-Senate Conference Committee is still working on the exact nature of the new federal mandate. AACRAO has focused its efforts on modifying the mechanical requirement of early versions of the mandate for inclusion of textbook information with the pre-registration process. On May 8, 2008, AACRAO filed its comments on proposed regulations published by the Department of Education to modify the Family Educational Rights and Privacy Act. AACRAO's comments supported the bulk of the proposed rule, which consist of a major regulatory update of FERPA to reflect recent legislative amendments, court decisions, and sub-regulatory guidance from the Family Policy Compliance Office. AACRAO did express concerns about a number of technical changes that, if finalized, would significantly undermine privacy protections for students.

Beyond its work with Congress and the agencies, AACRAO staff has worked with the Government Accountability office on two reports, one dealing with an evaluation of Academic Competitiveness/SMART grants, the other with program integrity requirements in Title IV.

6515 COMMUNICATIONS

AACRAO media relations efforts continue to very prominently feature the Association before the public. AACRAO was mentioned in more than 139 media outlets since March 21, 2008. Our media relations efforts have successfully communicated the AACRAO public policy positions.

source headline date Total

24-7 Press Release

White Mountain Launches UNiversiTools
 Exam schedul 6/5/2008 1
 45
 Action 3 News
 (www.kmtv.com)
 College Admissions Dance Gets Longer,
 More . . . 4/30/2008 2
 AME info
 White Mountain launches Universitools
 Exam schedul 6/8/2008 3
 AOL News Student loan bill advances, Bush will sign 4/30/2008 4
 ASU Web Devil New registration system's kinks being felt 4/29/2008 5
 Atlanta Journal-Constitution
 U.S. credit crunch rocks student loan
 business 4/10/2008 6
 Atlanta Journal-Constitution Calls for action louder as student loan . . . 4/13/2008 7
 Atlanta Journal-Constitution
 When will the school say 'yes'? It's a season
 of S 6/11/2008 8
 Austin American Statesman
 SAT to let students pick which scores
 colleges see 6/22/2008 9
 Blue Ridge Now
 Matching Newcomer to College, While
 Both Pay 5/11/2008 10
 Boston Globe Lenders drop out of student loan market 4/10/2008 11
 Boston Globe Southern grace, Yankee spirit 5/1/2008 12
 Boston Globe Student loan plan goes to Bush 5/1/2008 13
 Boston Globe
 Southern Grace, Yankee spirit N.E.
 Students aid... 5/1/2008 14
 Burlington Free Press Colleges court prospective students 4/16/2008 15
 Business Week Lenders drop out of student loan market 4/10/2008 16
 Central Utah Daily Herald
 STUDY: New SAT not a better gauge of
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 Central Utah Daily Herald
 SAT to Allow Students to Pick Which
 Scores . . . 6/20/2008 18
 Charleston Gazette Garrison report cites other records problems 6/1/2008 19
 Charleston Gazette Chasm 6/3/2008 20
 Chicago Daily Herald It's not academic as teens choose colleges 4/10/2008 21
 Chicago Daily Herald Credit crunch puts crimp in student loans 4/11/2008 22
 Chicago Tribune
 NIU, Virginia Tech shootings have impact
 on . . . 3/30/2008 23
 Chicago Tribune
 Home-schooled Evanston teen accepted by
 Harvard 4/17/2008 24
 Chicago Tribune More SAT test runs Okd 6/21/2008 25
 Chicago Tribune SAT will let students pick which scores . . . 6/21/2008 26

CNBC.com
 Lenders take federally-backed student loans
 . . . 4/10/2008 27
 Columbus Dispatch Colleges here yet to feel pinch 4/19/2008 28
 Columbus Dispatch Senator urges bigger, safer college loans 4/21/2008 29
 Columbus Dispatch Brown urges bigger, safer college loans 4/22/2008 30
 Courier News
 Study: SAT writing portion good predictor
 of grade 4/28/2008 31
 Dayton Daily News
 College students face hurdles in acquiring
 student 4/22/2008 32
 Deseret News
 Student lenders dropping federally backed
 loans 4/13/2008 33
 DiGiTAL50
 CIBER Wins \$3.6 Million Oracle
 Implementation . . 3/25/2008 34
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 Eagle Tribune
 Merrimack to see largest enrolment in
 decades 6/29/2008 35
 Fargo Forum Lenders dropping student loans 4/11/2008 36
 FinanzNachrichten
 CIBER Wins \$3.6 Million Oracle
 Implementation 3/24/2008 37
 First Source
 College Immaterial for High School
 students in voc 5/15/2008 38
 Forbes.com
 ANALYSIS-Student lender lobbying surges
 . . . 4/29/2008 39
 Forbes.com
 Student loan plan goes to Bush, lender
 stocks rise 5/1/2008 40
 Gainesville Sun
 Matching Newcomer to College, While
 Both Pay 5/11/2008 41
 Honolulu Advertiser
 Students to pick which SAT scores sent to
 colleges 6/22/2008 42
 Houston Chronicle
 Students will pick which scores to show
 colleges 6/21/2008 43
 Idaho Statesman
 High school career fair will be Tuesday at
 BSU 4/3/2008 44
 Indiana Gazette
 State tries to ease college transfer process
 with 5/14/2008 45
 Individual.com

SAT writing section predicts freshman
 grades . . . 6/17/2008 46
 Individual.com
 SAT writing section predicts freshmen
 grades, ... 6/17/2008 47
 Inside Higher Ed Shifting Gold Standard for Aid Policy 3/24/2008 48
 Inside Higher Ed
 U.S. Proposes New Rules on Student
 Privacy 3/24/2008 49
 Inside Higher Ed Enrollment Managers Struggle With Image 3/27/2008 50
 Inside Higher Ed Sticker Shock and Study Abroad 3/27/2008 51
 Inside Higher Ed Late Grades? Pay Up, Professor 3/28/2008 52
 Inside Higher Ed
 Senate Panel Proposes No-Cost Help for
 Lenders 4/23/2008 53
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 Inside Higher Ed When FERPA Affects It 5/8/2008 55
 Inside Higher ED NYU Downgrades Dual Enrolement 5/22/2008 56
 Inside Higher Ed
 How 2 Scandals Might Have Been
 Prevented 6/5/2008 57
 Inside Higher Ed VCU Improperly Awarded Degree 6/30/2008 58
 Inside Vandy Congress Fast Tracks Student Loan Bill 5/8/2008 59
 Interactive Investor International Lenders drop out of student loan market 4/10/2008 60
 International Herald Tribune International students turn to recruiters 5/11/2008 61
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 Perks for U.S. colleges sending students
 abroad 8/14/2008 62
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 What is CRM in Higher Ed? Research
 houses should.. 6/29/2008 63
 Journal-Gazette Lenders shy away from student loans 4/11/2008 64
 Kansas City Star Freshmen Flock To Universities 6/2/2008 65
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 KRON 4 News
 (www.kron4.com)
 College Admissions Dance Gets Longer,
 More . . . 5/1/2008 66
 LA Times
 SAT will let students pick which scores to
 show... 6/21/2008 67
 Lafayette Daily Advertiser Grades indicated by test scores 4/29/2008 68
 Los Angeles Daily News Lenders drop student loans 4/11/2008 69
 Los Angeles Daily News College agents profiting from diversity 5/11/2008 70
 Los Angeles Times SAT will let students pick which scores . . . 6/21/2008 71
 Loudoun Times-Mirror
 Parents Fight to change school's grading
 scale 6/11/2008 72
 Marshall Democrat-News

Lashley is 40th Valley Women's Hall of
 Famer . . . 5/1/2008 73
 Minnesota Public Radio
 Citibank suspends student loans to two year
 . . . 4/17/2008 74
 Morris County Daily Record
 Studies: SAT writing portion good
 predictor . . . 4/25/2008 75
 New York Times
 Yale Student Is Accused of Lying on
 Application 4/10/2008 76
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 Matching Newcomer to College, While
 Both Pay 5/11/2008 78
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 Newcomer matched to college while both
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 New York Times Certain Degrees cost more at universities 7/29/2008 80
 New York Times College Board Quits the loan business 8/23/2008 81
 News & Observer Colleges, students pay recruiters 5/11/2008 82
 News Channel 21
 (www.ktvz.com)
 College Admissions Dance Gets Longer,
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 College Admissions Dance Gets Longer,
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 Newsweek For Seniors, the Waiting Game Is On 4/14/2008 85
 Newsweek
 Media Matters: Why Britain's P.M. Is
 Popular . . . 4/30/2008 86
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 New SAT: Just so-so at predicting college
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 Pittsburgh Courier
 College transfer process easier with new
 Web Site 5/22/2008 97
 Pittsburgh Post-Gazette
 Executive's M.B.A. claims differ from
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 Pittsburgh Post-Gazette Bresch blocks release of full WVU report 4/20/2008 99
 Pittsburgh Post-Gazette
 WVU panel completes report on Bresch
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 Pittsburgh Post-Gazette
 Some want tougher action from WVU over
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 Pittsburgh Post-Gazette
 Many college seniors don caps and gowns .
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 Pittsburgh Post-Gazette
 Studies tout revised SAT's value, but some
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 Plain Dealer
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 Register-Guard SAT to let students pick top scores 6/22/2008 109
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 New web site helps in-state transfer
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 Salt Lake Tribune Prospective college students finding the . . . 4/14/2008 111
 Salt Lake Tribune
 Admission waiting lists help students hedge
 . . 4/16/2008 112
 San Francisco Chronicle Lenders quitting U.S. student loan program 4/11/2008 113
 Science Review News Pa. Student Takes on a challenge 6/27/2008 114
 SignOn San Diego
 Lenders taking a pass on helping college . .
 . 4/11/2008 115
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 South Carolina Enquirer
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 Shady past no deal-breaker in student loan
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 Shady past no deal-breaker in student loan
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 St. Petersburg Times Castor seeks checkups on college lenders 6/18/2008 120
 STLtoday.com Credit squeeze spurs lenders to drop out . . . 4/11/2008 121
 Straits Times College 'bounty hunters' raise eyebrows 5/11/2008 122
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 Schools use controversial commissioned
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 Yale Admitted, Funded Transfer Student . .
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 New SAT format is a good predictor of
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 Studies: SAT writing portion good
 predictor of... 4/26/2008 128
 Washington Post Student loan bill advances, Bush will sign 4/30/2008 129
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 Colleges Pick up the Tab; Mant replace
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 WMC-TV Memphis College Admissions Dance Gets Longer 6/18/2008 132
 Workplace Prof Blog Submit Grades or Else at Florida State 3/28/2008 133
 Yahoo! Canada News Lenders Drop Out of Student Loan Market 4/10/2008 134
 Yahoo! Canada News Student loan bill advances, Bush will sign 4/30/2008 135
 Yahoo! Canada News Student loan plan goes to Bush 5/1/2008 136
 Yahoo! Finance News Lenders Drop Out of Student Loan Market 4/10/2008 137
 Yahoo! News College admissions dance gets longer . . . 4/23/2008 138
 York Dispatch
 Government worries, scurries over student
 loans 4/11/2008 139

SecureU

In addition to it external placement activities, AACRAO launched SecureU, a monthly review of
 online and on-campus safety news, this fiscal year. This web-based newsletter has been produced
 through a contract with an outside firm, which generates the content in collaboration with
 AACRAO staff. As we enter the final quarter of the contract, in order to produce budget savings
 in the upcoming fiscal year, AACRAO has decided to produce the newsletter in-house using

existing staff resources. We will conduct an evaluation of SecureU prior to the transition in order to improve the publication.

6535 TRANSCRIPT

The AACRAO Transcript will continue to offer members the latest news about government relations, court proceedings, industry updates, and international developments affecting higher education. Items in the Transcript will be communicated to members each week via email blast containing ads for AACRAO services.

The Transcript continues to maintain the strongest traffic on aacrao.org, although unique visits are down from last year's peak amid Congress's budget reconciliation battle. Transcript is now the repository for over 4,000 articles.

The chart below contains the total monthly unique visitors to the transcript directory dating back to 2002.

Month 2,002 2,003 2,004 2,005 2,006 2,007 2,008

January 5,416 8,416 5,291 15,604 17,931 42,750 31,870

50

February 6,922 6,028 5,132 17,889 19,117 41,443 30,802

March 7,310 9,010 7,136 19,095 25,561 40,521 36,868

April 7,391 6,181 3,213 18,059 19,130 42,312 44,062

May 6,329 8,770 8,573 18,082 22,665 43,999 40,988

June 6,622 9,887 6,729 18,918 24,319 65,648

July 7,925 11,134 5,273 18,885 24,393 67,050

August 8,013 8,569 10,039 20,851 No data 52,531

September 8,145 8,535 12,810 18,689 24,199 27,380

October 10,035 8,052 10,953 18,404 30,917 34,719

November 7,777 5,400 10,150 16,245 43,651 33,118

December 7,488 5,127 12,583 15,780 46,893 28,963

6540 SEM SOURCE: An Update on Trends in State-of-the-Art Student Services

SEM Source provides members with news and information of interest to enrollment managers.

The publication is designed to enhance AACRAO's presence in the field of Strategic Enrollment Management as well as attract new attendees to the annual SEM Conference. Second, bundling the publication with membership enhances the value of joining the association and provides a new member benefit.

Recent issues have included the articles: Leveraging Financial Aid: A Powerful Tool for Enrollment Success, by Tom Green of Seton Hall University; The "ART" of Articulation, by Seth Marc Kamen of the University of Baltimore; Reengineering Enrollment Services to Create a Onestop Center and Common Service Philosophy, by Holly Diamond and Lisa R. Kujawa of Lawrence Technological University; How a One-stop-shop Approach Facilitates Enrollment of Nontraditional Students, by Wilson Lee, Jr. of Tennessee State University; The Constancy of Change: Lessons Learned in Enrollment Planning in a Post-Katrina World, by Ronald P. Maggiore of the University of New Orleans; The Enrollment Management and Student Success Committee: A Powerful Partnership, by Jane Sweetland of California State University Channel Islands; and When Enrollment Strategies Cross Traditional Boundaries: Opportunities and Challenges, by Janet Ward, of Seattle Pacific University.

SEM Source articles have been featured regularly in Memberlink. SEM Source has been advertised in C&U and in AACRAO conference programs.

The SEM Source database includes more than 400 feature articles.

PROJECTS/CONTRACTS

6755 CONSULTING SERVICES

Projects

Since March 2008 we have signed 14 new contracts for a total of 33 new projects for FY 2007-2008.

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Institution Project Description

American University of Kuwait Interim registrar services
Assiniboine Community College SEM workshop
Bastyr University SEM review
Eastern Virginia Medical School Combined registrar's office audit and financial aid office audit
Fielding Graduate University Review of online policies
North Carolina A&T State University Registrar's office audit
Northeastern Illinois University SEM Review
Park University Multi-campus admissions office audit
Portland Community College Student records and Veterans' Affairs program reviews
The College of Westchester Records management review
Tulsa Community College SEM workshop
University of Maryland, School of
Nursing, Phase Two extension Interim SEM leadership
University of Massachusetts
Dartmouth Registrar's office audit
University of Nevada Las Vegas Development of Academic Success Center

FY 2008

Pub 4yr Pub 2r Pri 4yr Other Total
Inquiries 38 26 42 10 116
Proposals 27 14 20 5 66
Contracts 15 7 8 2 32
Contracted fees \$264,755 \$99,110 \$76,725 \$32,600 \$473,190

Web site

The AACRAO Consulting web site continues to be a primary source of project inquiries. We have established a timeline for weekly update to site material, to keep it fresh and encourage return visits. Recent posts include SEM Briefs by Senior AACRAO Consultants Christine Kerlin and Tom Green, advertisements of AC webinars, announcements of AC exhibits at AACRAO meetings, and service offerings such as Financial Aid Office audits, Registrar Office audits, and Admissions Office audits. The AC website continues to be the top Google Search result for strategic enrollment management consulting. Competitors such as SEMWorks and McGuire & Associates are paying for Google ads as their sites do not appear as high on Google search results pages.

Web stats for March 2008 - June 2008 are:

5,935 visits (almost 50% of visits came from Google Searches)
19,264 page views
Avg. pageviews per each visit: 3.25
Avg. time spent on site per each visit: 1 minute 53 seconds.
1,764 visits came from university/college-based networks.
52

Top ten keyword searches from March - June:

enrollment management
strategic enrollment management
aacrao
aacrao consulting
bob bontrager
aacrao sem
sem (this is due to the internal Google search that AACRAO uses. People were searching for SEM on AACRAO.org in large numbers)
conferences (same as above)
aacrao conference
webinar (another keyword from the AACRAO.org internal Google Search)

Top ten site content by pageviews:

Home page 4,832

Consultant Bios 1,300

A Community College Roadmap for the SEM Journey 709

Developing Recruitment, Marketing, and Communication Plans 519

Strategic Enrollment Planning 449

Organizational Models for Enrollment Management at Small Colleges 442

Conferences 416

Comprehensive SEM Review 414

Retention Analysis 349

Our Approach 346

Marketing

AACRAO Consulting will exhibit at the AACRAO Technology Conference in July 2008 and the AACRAO SEM Conference in November 2008. Announcements advertising AC's presence at these meetings will appear on the AC web site and in MemberLink. AACRAO Consulting marketing materials have been present at the AACRAO booth at several state and regional ACRAO meetings including: ALACRAO (Alabama) in February 2008; FACRAO (Florida) in June 2008; and OrACRAO (Oregon) in May 2008.

Post-consulting phone calls are being placed to evaluate effectiveness of services provided and to generate material for testimonials. Recently completed testimonials that have appeared on the AC web site are:

- Studio Art Centers International (SACI)
- Michigan Technological University
- University of Michigan – Flint

Webinars

In May and June AACRAO Consulting held a webinar series with SPSS titled "Proactively Identifying At-Risk Students Using Predictive Analytics". The webinars were presented by Bob Bontrager, Director of AACRAO Consulting and the SEM Conference, and James Parry, Systems Engineer with SPSS.

Part I of the webinar series had 370 participants and received positive feedback from participants. Of the 370 webinar attendees 162 responded to the follow up survey and the majority of feedback was favorable regarding the webinar content and presentation. 86% of respondents said the topic

should be repeated, and 74% of respondents felt that the information presented will be useful to their work environment. As of June 27, 2008, 104 people have viewed the archived presentation. Part II of the webinar series had 226 attendees. 62 of the 226 webinar participants responded to the follow up survey and the majority of respondents had positive feedback. Like Part I of the series, there were requests for more information on the topic (92% of survey respondents). 90% of survey respondents agreed that the webinar enhanced their understanding of the material, and 77% of respondents found the webinar excellent or above average. As of June 27, 2008, 30 people have viewed the webinar archive.

The webinar series was advertised in MemberLink, Transcript, on the AC web site, and through e-mail blasts to AACRAO members and SPSS clients.

Upcoming webinars include:

- Outcomes-Based Research (Parts I and II) with SPSS
- Building Your SEM Infrastructure: Business Practice Redesign
- SEM in Community Colleges

Content Development

SEM Finance Book

Bob Bontrager is nearing completion on a book he is co-authoring with Don Hossler and Gil Brown with the tentative title "The Paradox of SEM: Fulfilling Goals for Student Access and

Institutional Financial Outcomes”. We plan to have the book available for the SEM Conference. SEM Briefs

A SEM Brief on SEM and financial aid leveraging, “Leveraging Financial Aid: A Powerful Tool for Enrollment Success”, authored by Tom Green, appeared in SEM Source and on the AC web site in June 2008. The paper is scheduled to be e-mailed to members and appear in MemberLink and Transcript in July 2008. A retention paper by Amanda Yale is scheduled this summer.

MARKETING

(Number not yet assigned) **Marketing**

AACRAO’s Identity Management Workshop

The marketing department worked with representatives of EDUCAUSE and Internet2 to plan and promote the Identity Management Workshop, “Developing Effective Identity Management Strategies for Your Institution.” This workshop took place on July 9-10, 2008 prior to AACRAO’s Technology Conference. The department developed the branding and marketing campaign for the Identity Management Workshop. The intensive marketing efforts included articles in *Memberlink*, *Transcript*, and *C&U*; email blasts; and listings on multiple higher education meeting sites. The Workshop attracted 80 registrants and sold out two weeks prior to the event. The National Student Clearinghouse sponsored the workshop for \$10,000.

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AACRAO Consulting & Webinars

SPSS

The Marketing Department worked with SPSS and AACRAO Consulting to orchestrate and execute a special Webinar series, “Proactively Identifying At-Risk Students Using Predictive Analytics.” The two-part series, which took place May 21 and June 11, 2008, was geared toward college and university staff officers interested in learning strategies to cope with at-risk students. Presenters were Bob Bontrager, Director, AACRAO Consulting and the AACRAO SEM Conference, and James E. Parry, Systems Engineer for SPSS. Advertising took place via AACRAO email blasts, *Inside Higher Ed*, *Memberlink* and *Transcript*. There were 370 registrants for Part I of the series and 197 registrants for Part II. The joint Webinars were wellreceived by both audiences, and our SPSS corporate contacts were very pleased with the positive feedback in the post-webinar surveys. SPSS discussed re-running this series or coming up with new topics for future AACRAO Webinars.

Implementing Direct Lending for Community Colleges

The marketing department advertised and marketed a free Webinar on June 26 which discussed the implementation of the Direct Loan Program on community college campuses. AACRAO, the American Association of Community Colleges (AACC), the National Direct Student Loan Coalition (NDSLC) and the U.S. Department of Education (ED) co-sponsored the event. The Webinar provided an overview of the steps necessary to implement direct lending on community college campuses. The presenters included Eileen K. O’Leary, Asst. VP for Finance and Director of Student Financial Services, Stonehill College; Sue O’Flaherty, Senior Advisor of Program Operations for Federal Student Aid, U.S. Department of Education; and Heidi Granger, Director of Financial Aid, College of the Desert and Senior AACRAO Consultant. AACRAO marketing worked closely with AACC to promote this event. There were over 120 registrants for this Webinar.

6806 EXECUTIVE SYMPOSIUM

In conjunction with AACRAO consulting, AACRAO marketing will begin promoting AACRAO’s 3rd Annual Executive Symposium, “Achieving Enrollment Success for the Long Term.” The Executive Symposium is scheduled to run on November 16, 2008, just prior to the main SEM Conference. The target audience for the Symposium is being expanded this year. In addition to presidents, chancellors, and provosts, the symposium invitations will encourage attendance by executive teams, including chief enrollment officers and cabinet-level executives.

Research

AACRAO marketing conducted two focus groups at the AACRAO TECH Conference in Baltimore, Maryland. The focus was on researching the technology needs of higher education professionals in the area of student services and AACRAO will use the feedback to improve programming for next year's TECH Conference. Furthermore, AACRAO marketing conducted the post conference surveys for both AACRAO TECH and the Identity Management Workshop in conjunction with AACRAO's IT department.

AACRAO Centennial

The AACRAO Centennial team has launched the event website and has begun preparations to sell sponsorships. A sponsorship brochure is currently in production and the AACRAO Associate Executive Director is cultivating relationships with corporate sponsors to garner their support. Furthermore, AACRAO marketing is requesting additional RFP's for the video montage to ensure a high quality, cost effective presentation.

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AACRAO Media Agreements

AACRAO is in the process of expanding its media agreement with the *Chronicle of Higher Education* to three half-page color ads for 2008. AACRAO marketing renewed its agreements with *Inside Higher Ed* and the *Greentree Gazette*. The scope of the agreement with *Inside Higher Ed* has been expanded to include two additional AACRAO meetings. The in-kind advertising with *Inside Higher Ed* is valued at \$27,500.

MARKETING OUTREACH EFFORTS

AACRAO recently exhibited at the following meetings:

- NASPA, Boston, MA. March 8 – 12, 2008.
- AACC, Philadelphia, PA. April 5 – 8, 2008
- NAGAP, Denver, CO. April 30 – May 3, 2008
- NAFSA, Washington, DC. May 25 – 30, 2008
- NASFAA, Orlando, FL. July 6 – 9, 2008

AACRAO recently shipped outreach materials to the following State & Regional meetings in the spring:

- NY/NJ ACRAO (March)
- California ACRAO (April)
- Oregon ACRAO (May)
- WACRAO (May)
- Florida ACRAO (June)
- Alabama ACRAO (June)
- ARUCC - Association of Registrars of the Universities and Colleges of Canada (June)
- Rocky Mountain ACRAO (July)

**Note: AACRAO is currently developing an exhibiting schedule for 2009*

INTERNATIONAL EDUCATION SERVICES (IES)

6900 EVALUATION SERVICES

The volume of files processed:

Oct '03 – Jun '04 3556

Oct '04 – Jun '05 3628

Oct '05 – Jun '06 3975

Oct '06 – Jun '07 6312

Oct '07 – Jun '08 7096

Revenue for Fiscal Year '08:

56

FY 2007 FY 2008

Month Revenue Expense Net YTD

Net

Month Revenue Expense Net YTD Net

Oct 91,342 64,715 26,627 26,627 **Oct** 66,296 64,172 2,123 2,123
Nov 86,484 70,043 16,441 43,068 **Nov** 123,746 76,708 47,038 49,162
Dec 47,575 59,875 (12,300) 30,588 **Dec** 108,413 79,255 29,158 78,320
Jan 117,277 57,943 59,333 89,921 **Jan** 129,689 84,055 45,614 123,934
Feb 63,441 55,196 8,245 98,167 **Feb** 71,563 61,748 10,815 134,564
Mar 78,676 61,645 17,030 115,197 **Mar** 76,528 57,040 19,488 168,487
Apr 46,260 74,773 (28,513) 86,683 **Apr** 81,848 55,946 25,902 193,554
May 92,845 103,217 (10,373) 76,310 **May** 99,698 81,318 18,299 211,853
Jun 71,164 76,375 (5,211) 71,099 **Jun**
July 80,067 88,020 (7,953) 63,146 **Jul**
Aug 43,360 83,649 (40,289) 22,857 **Aug**
Sept 64,256 91,055 (26,829) (3,972) **Sept**
Totals 882,716 886,688 (3,972) (3,972) **Totals**

Continued growth in the use of the on-line application form has also been observed with more than 80% of the requests processed using the on-line version. On-line applications for other types of requests (institutions requesting evaluations, extra copies, re-evaluation requests) will be available before the end of this fiscal year.

Several technological innovations, made possible by the IT department, have greatly reduced the time now required to assign files to the evaluators. Files are now assigned to evaluators by means of the 'workflow' function within the Image Now imaging system requiring about 1/10th the time previously needed to assign files. The new high speed scanner has also enabled the processing of files to move more quickly.

6905 TRAINING/CONSULTING

In June two IES staff conducted training in evaluating foreign education at Pace University in New York City for approximately 25 staff.

6915 SUMMER INSTITUTE FOR INTERNATIONAL ADMISSIONS

Registration fees for this year's Summer Institute for International Admissions are running only slightly behind last year's sold-out training seminar. This year fees were slightly increased and the institute was restructured, affording AACRAO similar revenues as last year while registering 25% fewer participants thus far. Historically, the first 10 business days of July usually represents our heaviest registration period.

6925 LAW SCHOOL ADMISSIONS COUNCIL (LSAC) CREDENTIALING SERVICE

The volume of evaluations for LSAC continues to increase, even though a decrease had been anticipated for this year. Last year AACRAO was asked to evaluate 'study abroad' programs of those choosing to participate in the Credentialing Service despite the fact that such students had received degrees from U.S. institutions. That practice was discontinued this year and it was believed that our numbers would decrease somewhat – but increased numbers of applicants for the JD and LLM degrees more than made up for the loss of volume represented by the 'study abroad' requests.

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6450 ELECTRONIC DATABASE FOR GLOBAL EDUCATION (EDGE)

Currently there are 134 country profiles available on EDGE, with three to six additional profiles added every month.

In June, it was discovered that filters to catch corporations subscribing to EDGE as non-member institutions was not functioning as designed. Approximately 12 'non-member institution' subscribers who were actually corporations were notified that they needed to subscribe at the corporate rate. At this time eight have now subscribed at the \$3,000 corporate rate.

AACRAO had an exhibit booth (we were only demonstrating EDGE) at the recent AILA (American Immigration Lawyers Association) annual conference in Vancouver BC. During this conference every session which included a presenter from U.S. Immigration mentioned that EDGE was now a resource used by adjudicators in the approval of work visas. After each such

session the law firms would come to the booth for a demonstration, or to discuss subscribing to EDGE. The reaction to EDGE was very positive and we will follow this up with an article on EDGE in an upcoming AILA journal.