

American Association of Collegiate Registrars and Admissions Officers
Minutes of the Meeting of the Board of Directors
February 26-27, 2010

Board Members in Attendance: Sam Conte, Cherie Hatlem, Betty Huff, Adrienne McDay, Glenn Munson, Wanda Simpson Munson, Michele Sandlin, Jeffrey von Munkwitz-Smith, Robert Watkins, Paul Wiley

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

Board Nominees: Nancy Krogh, Nora McLaughlin, Brad Myers

Guests: Adnan Bokhari, Flormelyn Crispino, Brian McQuade, Kathy Raffa, Arun Sardana

Call to Order

President Simpson Munson called the meeting to order at 8:40 a.m. Eastern Time.

Welcome 2010-2011 Board Nominees

President Simpson Munson welcomed 2010-2011 Board Nominees Nancy Krogh, Nora McLaughlin, and Brad Myers.

Approval of Agenda

MOTION 2010.2.01 – It was duly moved and seconded that the agenda be approved as presented.
ADOPTED

Reading and Approval of Minutes

MOTION 2010.2.02 – It was duly moved and seconded to approve the minutes from the meeting of the Board of Directors via conference call on January 27, 2010. ADOPTED

Reports of Board Committees

Finance & Investments Committee

The chair of the Finance & Investments Committee presented its report. Also reporting to the Board were Arun Sardana, Investment Consultant, Adnan Bokhari, CPA, and Brian McQuade, Managing Partner
MOTION 2010.2.03 – It was duly moved and seconded to refer the draft Investment Policy changes to the Finance & Investments Committee for review and amendment. ADOPTED

Compensation Committee

The chair of the Compensation Committee deferred its report for discussion during the Executive Session portion of the agenda.

Program Review & Development Committee

The chair of the Program Review & Development Committee presented its report.
MOTION 2010.2.04 – It was duly moved and seconded that the Leadership Meeting be reinstated for the Program Committee, the incoming chairs of the PACs, the caucus chairs, and the conference chairs of SEM, Transfer, and Technology beginning in fiscal year 2010-2011. The meeting will be renamed to reflect the program planning aspect of the meeting. ADOPTED

Staff Report

Associate Executive Director Janie Barnett presented a status report on the Annual Meeting to the Board.

Audit Committee

The chair of the Audit Committee presented its report. Also reporting was Kathy Raffa and Flormelyn Crispino, external auditors.

MOTION 2010.2.05 – It was duly moved and seconded to accept the report of the external auditors as amended on page 11 (liquidated damages amount corrected from \$34,815,610 to \$3,815,610) for the fiscal year ending September 30, 2009. ADOPTED

Governance Committee

The chair of the Governance Committee presented its report.

Strategic Planning Committee

The chair of the Strategic Planning Committee presented its report.

President Simpson-Munson ordered the reports to be filed.

Report of Executive Director

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

President Simpson-Munson ordered the Executive Director's report filed.

Other Staff Reports

- Associate Executive Barmak Nassirian presented an update on Government Relations activities.
- Associate Executive Director Jeff Petrucci presented an update of IES and EDGE activities and the plan to conduct a Quatt Salary Survey.

Reports of Individual Officers

Vice President von Munkwitz-Smith

- Discussed AACRAO's PESC membership.

Vice President Watkins

- Presented an update on the status of the international guide and discussed the upcoming EDGE meeting.

Vice President McDay

- Informed the Board that she was holding quarterly conference calls with caucus chairs.

Vice President Sandlin

- Reported that there was now a chair for the Financial Aid Committee.

Vice President Munson

- Informed the Board that the Electronic Transcript Task Force would be conducting a survey of corporate members who deal with electronic transcript exchange.

Vice President Conte

- Reported to the Board on the results of his audit of the Executive Director's expense reports.

Vice President Hatlem

- Reported that the Professional Development Committee needs a chair and a vice chair. She also reported that the State & Regional Relations Committee is finalizing the agenda for the AACRAO annual meeting.

Past President Wiley

- Presented candidates for organizational awards.

MOTION 2010.2.06 – It was duly moved and seconded to present the APEX Award to Margaret Bellon, Director of Graduation and Transfer Services, Utah Valley University; the Award for Excellence in International Education to Cliff Sjogren, Honorary Member, and Linda Kosene, AACRAO Employee (posthumously); the Distinguished Service Award to Virginia Johns, Registrar, University of California at Santa Barbara; The Elbert W. Ockerman State and Regional Professional Activity Award to the Kentucky Association of Collegiate Registrar and Admissions Officers; The Founders Award for Leadership to R. Gerald Pugh, Honorary Member; Honorary Membership to Dennis Dulniak, Vice President for Higher Education Services, AVOW Systems, Inc.; and the Thomas A. Bilger Citation for Service to Dorene Root, Associate Registrar for Records and Registration, Central Michigan University and Robert Doolos, University Registrar, Louisiana State University. ADOPTED

President-Elect Huff

- Reported on the status of the program for the annual meeting.

President Simpson Munson

- Reported on conference call and discussion with Canadian colleagues.

President Simpson-Munson ordered the reports to be filed.

Board Meeting in Recess – 5:26 p.m. Eastern Time (2/26/10)

Board Reconvened – 8:33 a.m. Eastern Time (2/27/10)

Unfinished/Old Business

Action Items – the Board's action items list was reviewed and updated.

Leadership Project – Executive Director Sullivan updated the Board on the status of the Leadership Project with Vanderbilt University.

New Business

- Review 2010-2011 Budget

MOTION 2010.2.07 – It was duly moved and seconded to approve the proposed FY 2010-2011 budget. ADOPTED

- Discuss Nomination of Parliamentarian

MOTION 2010.2.08 – It was duly moved and seconded to appoint Mary Ellen Flaherty, Johns Hopkins University, to serve as parliamentarian for the 2010 annual meeting. ADOPTED

Executive Session

The Board of Directors met in Executive Session.

Reports from Ad Hoc Committees

Approved Ethics Task Force Proposal

It was agreed that President Simpson Munson would send out the approved Ethics Task Force's Proposed Professional Practices and Ethical Standards document to the membership for review and comment.

Governance Task Force

The Board discussed the amended Initial Report of the Task Force on Association Governance.

MOTION 2010.2.09 – It was duly moved and seconded to that, in order to encourage AACRAO members to read, discuss, and comment on the initial report of the Task Force on Association Governance, the initial report shall be advertised as follows:

- Notice of the availability of the initial report shall be featured in each week's AACRAO Memberlink between March 1, 2010, and May 31, 2010, appearing as the lead item in that publication once in March 2010, once in April 2010, and once in May 2010;
- Notice of the availability of the initial report shall be featured in each week's AACRAO Transcript between March 1, 2010, and May 31, 2010, appearing as the lead item in "AACRAO Announcements" section of that publication once in March 2010, once in April 2010, and once in May 2010;
- Notice of the availability of the initial report shall be announced in three standalone e-mail "blasts" delivered to the entire AACRAO membership, once each in March, April, and May 2010.

The co-chairs of the task force shall provide the text for the notices and e-mail "blasts" and shall work with the appropriate AACRAO staff to coordinate the timing of the e-mail "blasts". ADOPTED

Adjournment

MOTION 2010.2.10 – It was duly moved and seconded that the Board of Directors meeting be adjourned. ADOPTED

The Board of Directors meeting adjourned at 2:56 p.m. Eastern Time.

Attachments

Board of Directors Meeting Minutes, January 2010

Board of Directors Financial Update, January 2010

Program Review and Development Committee Report

President-Elect Report

Executive Director Report

**American Association of Collegiate Registrars and Admissions Officers
Minutes of the Meeting of the Board of Directors**

January 27, 2010
via Conference Call

Board Members in Attendance: Sam Conte, Betty Huff, Adrienne McDay, Glenn Munson, Wanda Simpson Munson, Michele Sandlin, Jeffrey von Munkwitz-Smith, Robert Watkins, Paul Wiley

Staff Members in Attendance: Matt Ogle, Jerome Sullivan

Call to Order

President Simpson Munson called the meeting to order at 2:05 p.m. Central Time.

Approval of Agenda

MOTION 2010.1.01 – It was duly moved and seconded that the agenda be approved as amended.
ADOPTED

Approval of Minutes

MOTION 2010.1.02 – It was duly moved and seconded to approve the minutes from the meeting of the Board of Directors on December 3-4, 2009, as amended. ADOPTED

Reports of Individual Officers

President-Elect Huff presented an update of the conference program, the 2010 December Leadership Meeting, the 2010-2011 Board meeting dates, and the proposed composition of the Board committees for 2010-2011.

Vice President Conte presented the financial report for the first quarter (October-December 2009) of AACRAO's fiscal year.

Past-President Wiley presented an update on the Governance Task Force (GTF) Report.

MOTION 2010.1.03 – It was duly moved and seconded to extend the submission deadline for the final report of the Governance Task Force to the Board until August 31, 2010. ADOPTED

President Simpson-Munson presented an update on the Professional Practices and Ethical Standards Proposal.

MOTION 2010.1.04 – It was duly moved and seconded to recognize Susan Van Voorhis as the Member-at-Large to the Audit Committee and Brad Myers as the Parliamentarian for their service at the April 2010 annual meeting. ADOPTED

Executive Director Report

Executive Director Sullivan presented his report, which included updates on the results of the Winter Institute, planning for the SEM Conference, marketing for AACRAO Consulting, and next year's Transfer and Tech Conferences, and the status of the Annual Meeting. He also reported that the final audit draft is in; he is working on the 2010-2011 Operating Plan and the 2010-2011 association budget.

President Simpson Munson ordered the reports filed.

Discuss Agenda for February 25-28, 2010 BOD Meeting (Washington, D.C.)

The Board discussed the tentative agenda for the December Board of Directors meeting.

Review of Action Items from October Board Meeting

The Board's Action Item list was reviewed and updated.

Adjournment

MOTION 2010.1.05 – It was duly moved and seconded that the Board of Directors meeting be adjourned.

ADOPTED

The Board of Directors meeting adjourned at 3:17 p.m. Central Time.

Attachments

Board of Directors Meeting Minutes, December 2009

Board of Directors Financial Update, December 2009

Governance Task Force Status Report



AACRAO Monthly Financial Update

Highlights | Fiscal Year 2010 | January 2010

Presented by: Jerry Sullivan and Samuel Conte

Overview

AACRAO's total operating revenue for the month exceeded expenses by \$44,942, and \$516,984 for the four months ended January 31, 2010.

The Association's investments portfolio generated a net loss of (\$79,269) for the month, and a positive return of \$38,295 for the four months ended January 31, 2010.

AACRAO's combined operating and investment activities produced a deficit of (\$34,327) for the month of January, and a surplus of \$555,279 for the four months ended January 31, 2010.

Financial Position

The following summarizes AACRAO's financial position as of:

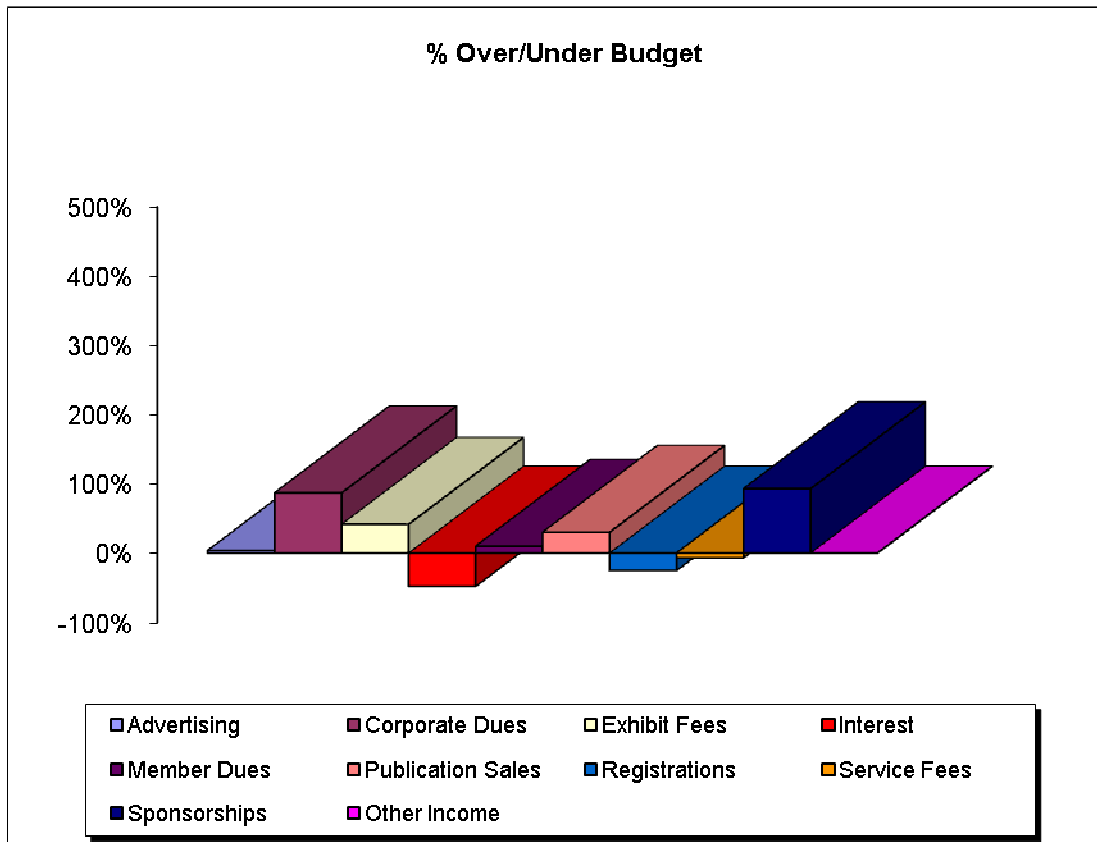
	January 2010	December 2009	Change
Cash	\$1,254,994	\$1,194,430	\$60,564
Investments	5,644,839	5,723,321	(78,482)
Accounts Receivable	195,454	264,469	(69,015)
Prepaid Expenses	286,291	244,953	41,338
Total Assets	7,723,475	7,764,813	(41,338)
Accounts Payable	87,166	231,284	(144,118)
Unearned Income	1,914,758	1,777,656	137,102
Total Liabilities	2,354,320	2,361,335	(7,015)
Net Assets	\$5,369,155	\$5,403,478	(\$34,323)

The increase in cash balance reflects receipts related mainly to the Annual Meeting and transfer conference. The decline in value of the investment portfolio is due to poor market performance during the month. Prepaid expenses increased in January as a result of Annual Meeting and transfer conference related expenditures. Accounts payable decreased during the month primarily due to payment of SEM conference related expenses that were accrued in November. Unearned income increased in January primarily as a result of Annual Meeting and transfer conference receipts.

As a result of the cross over between the dues year (July through June) and the fiscal year (October through September), three months of 2009/2010 dues were recognized in FY 2008/2009 and the other nine months will be recognized in FY 2009/2010. For the 2008/2009 membership year, \$2,415,435 was collected for membership dues and \$121,675 for corporate dues. Dues notices for membership year 2009/2010 were mailed on May 19, 2009, a week earlier than the previous year. As of January 31, 2010, \$2,282,637 and \$114,263 has been collected for membership dues and corporate dues, respectively.

Statement of Activities

Revenue: Revenue generated for the four months ended January totaled \$2,457,836 or 102% of the month's budget (2% above budget expectations). Six revenue generating activities exceeded their budget target while others are either at or fell below expectations. The following chart summarizes the variances between actual and budget amounts:



Exceeding Expectations:

Advertising: 4% | \$1,600

Corporate Dues: 87% | \$23,500

Exhibit Fees: 42% | \$31,700

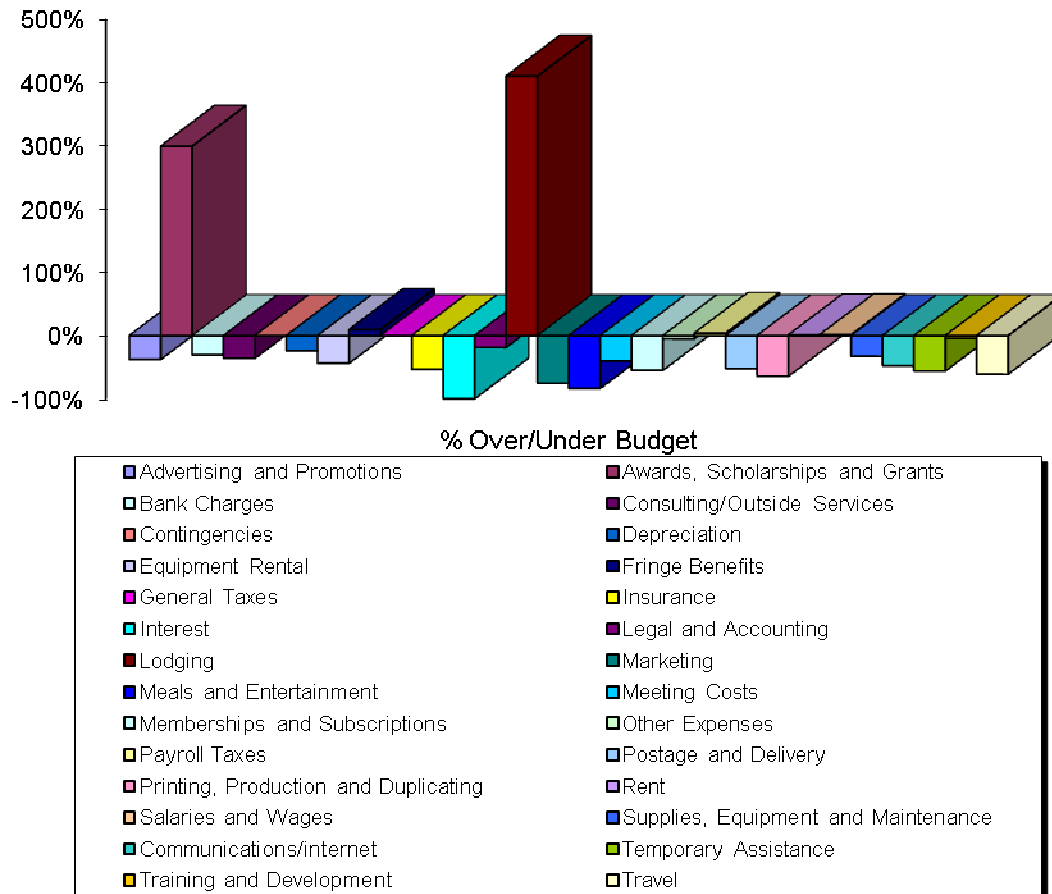
Member Dues: 10% | \$75,500

Publication Sales: 30% | \$47,700

Sponsorship: 93% | \$62,000

Publication sales revenue reported better than expected results and is likely to remain strong throughout the year. Membership dues revenue exceeded its budget target for January. SEM 2009 conference contributed positively to the overall financial performance of AACRAO, generating better than projected results in sponsorship and exhibits revenue line items.

Expenses: Expenses for the four months ended January totaled \$1,940,852 or 78% of the month's budget (22% below budget expectations). Six expense line items exceeded their budget target, while others remained at or below budget.



Exceeded Budget:

Awards, Scholarship and Grants: 300% | \$1,500

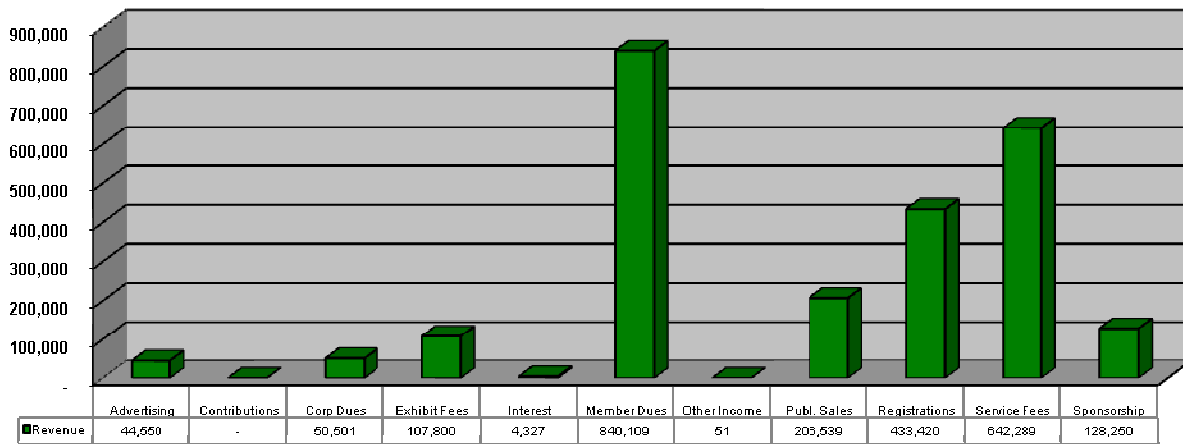
Personnel costs: 1% | \$28,000

Rent: 1% | \$1,000

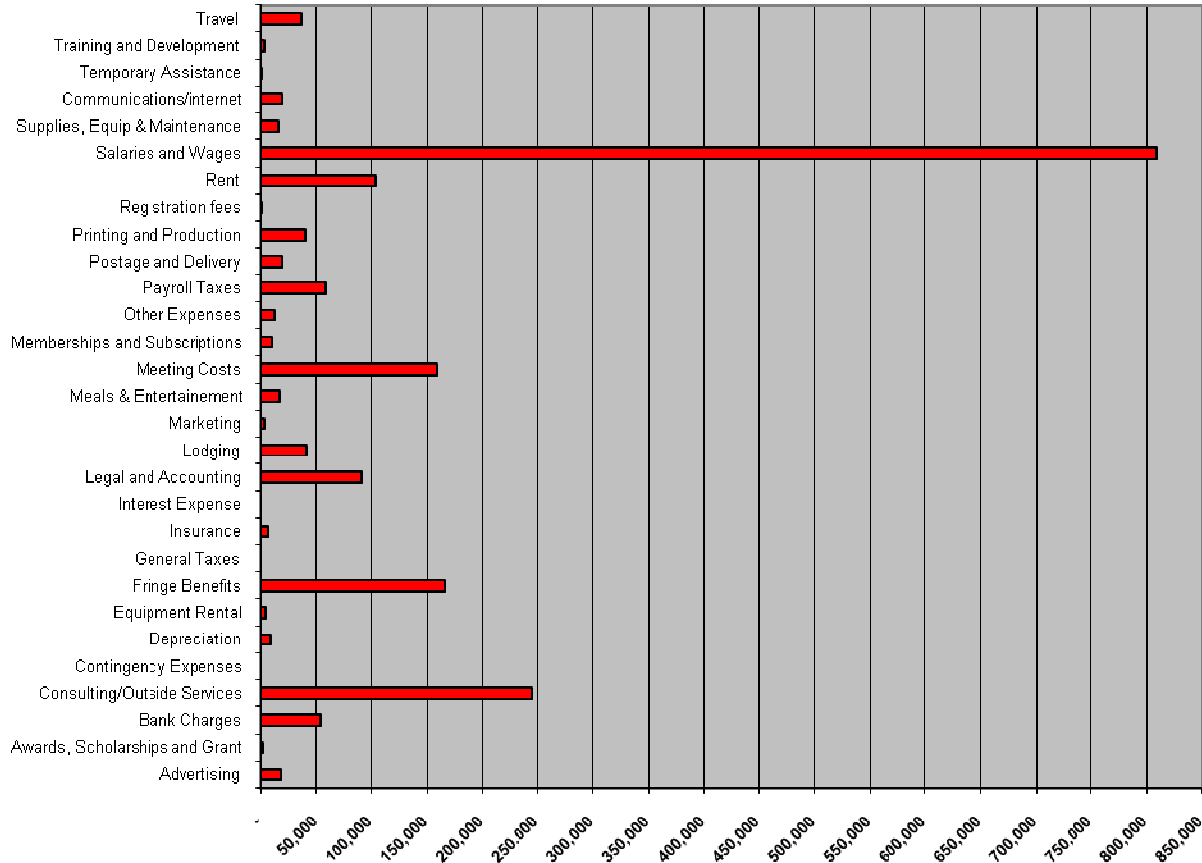
The excess in the above expenses is attributable to incurrence of expenses not provided for in the fiscal year budget.

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	-	894,937	-	55,550	-	651,320	179,400	-
Expenses	132,283	422,865	79,732	105,327	38,091	351,576	70,999	48,170
Net Operating	(132,283)	472,072	(79,732)	(49,777)	(38,091)	299,744	108,401	(48,170)

	CM	BD	AC	PC	IES	MK	TOTAL
Revenue	27,190	-	167,055	-	482,384	-	2,457,836
Expenses	86,779	81,370	167,452	-	355,062	1,146	1,940,852
Net Operating	(59,589)	(81,370)	(397)	-	127,322	(1,146)	516,984

Gifts/Bequests

-

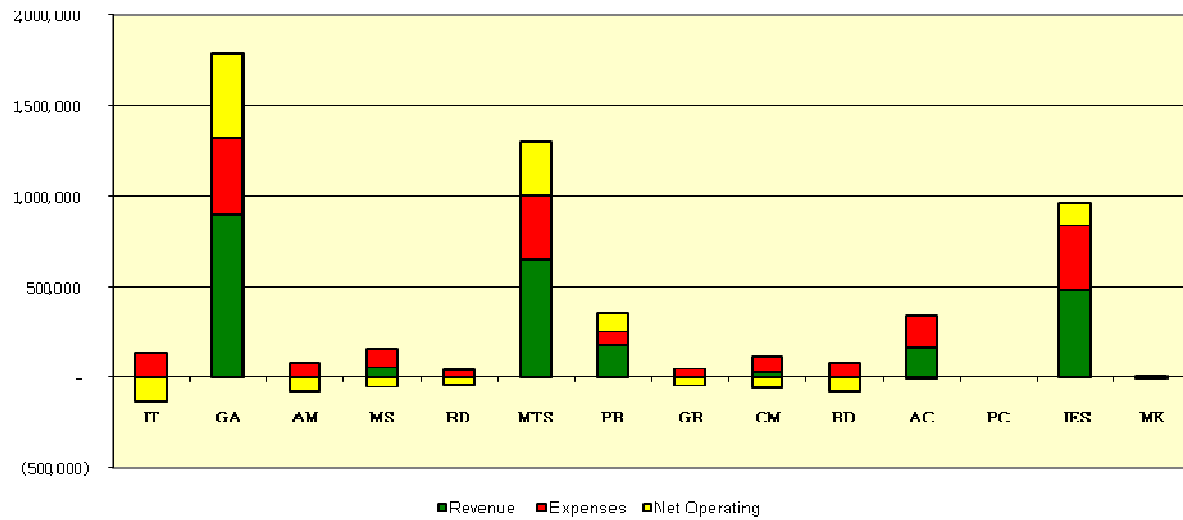
Investments

38,295

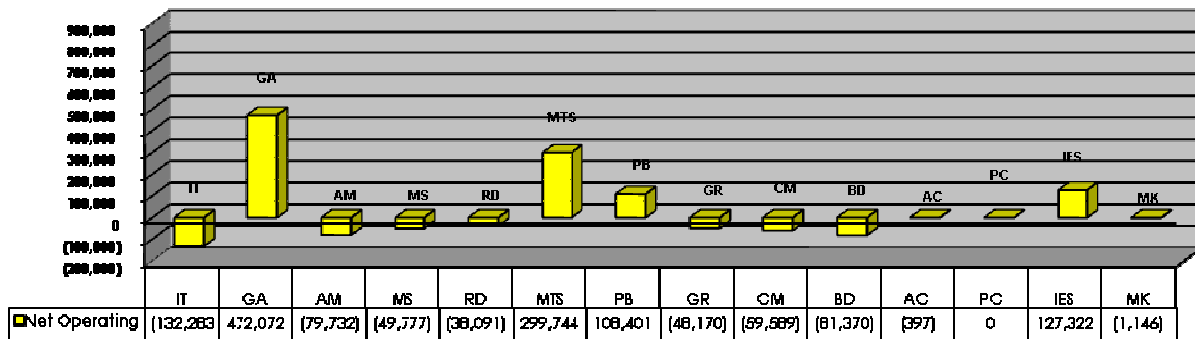
Net surplus

555,279

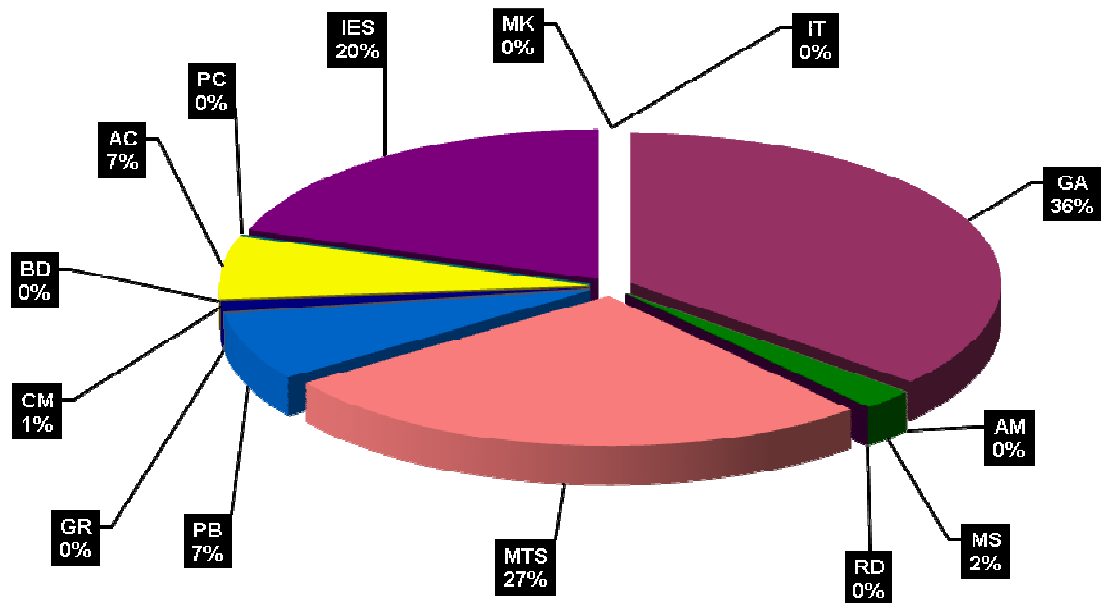
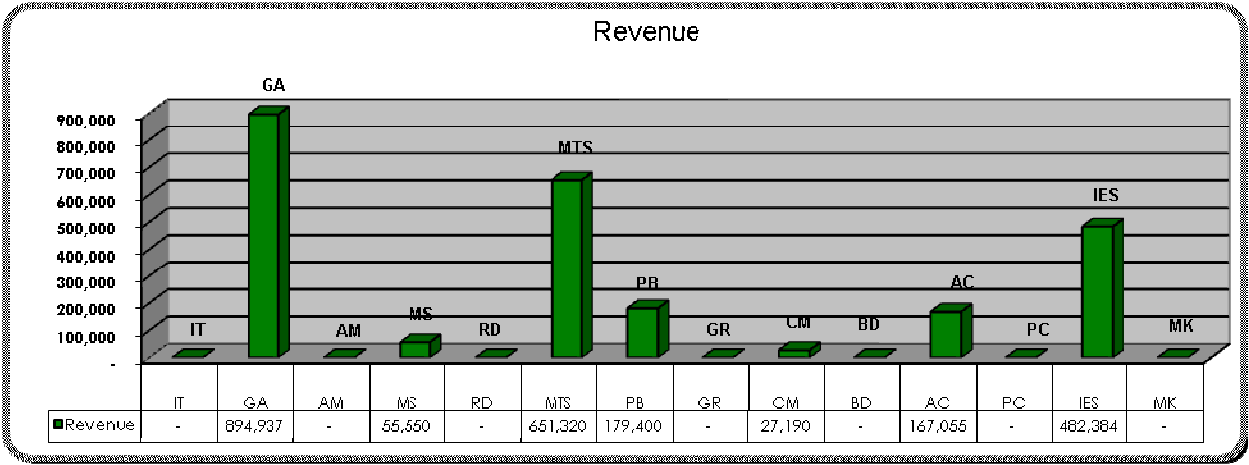
IT: Information Technology - GA: General and Administrative - AM: Annual Meeting - MS: Member Services - RD: Research - MTS: Meetings/Workshops - PB: Publications - GR: Government Relations - CM: Communications - BD: Governance - AC: AACRAO Consulting - PC: Projects Contracts - IES: Int'l Education Services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



Net Operating

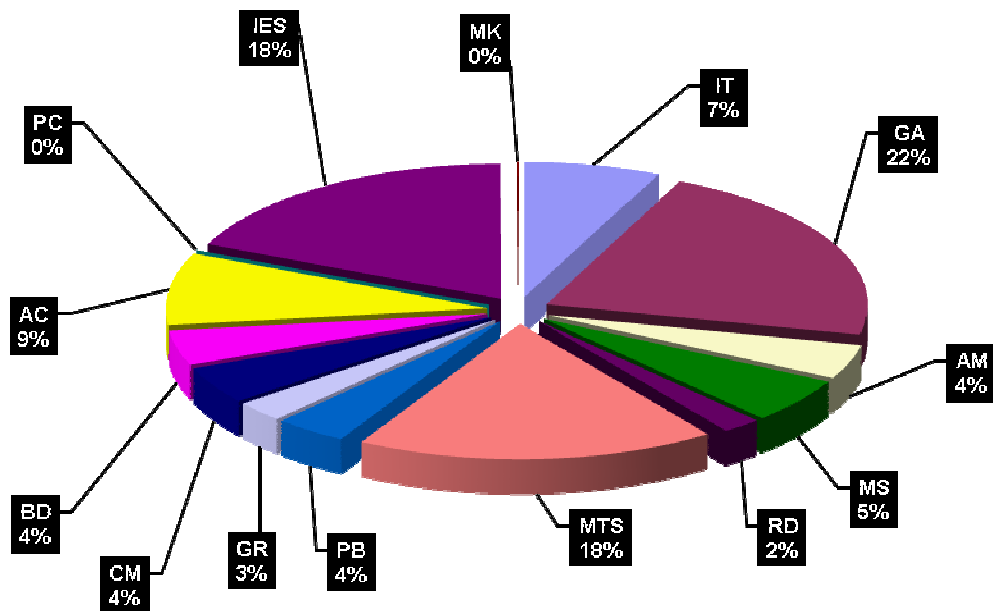
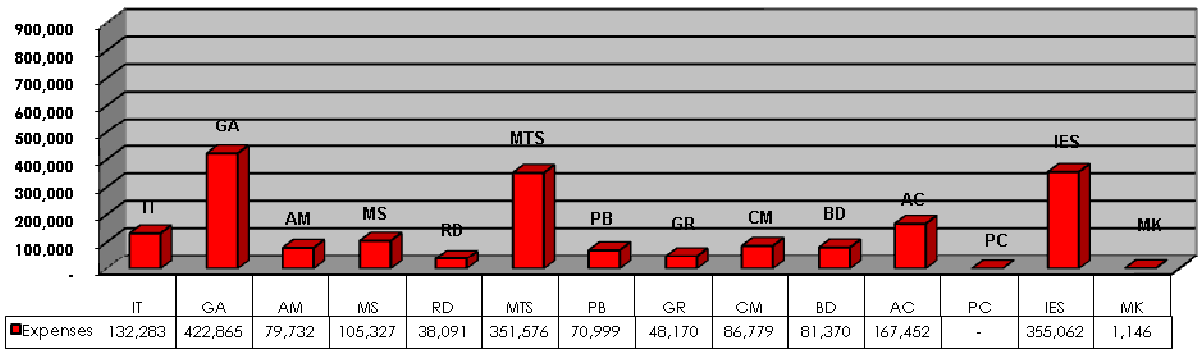


Revenue



Expenses

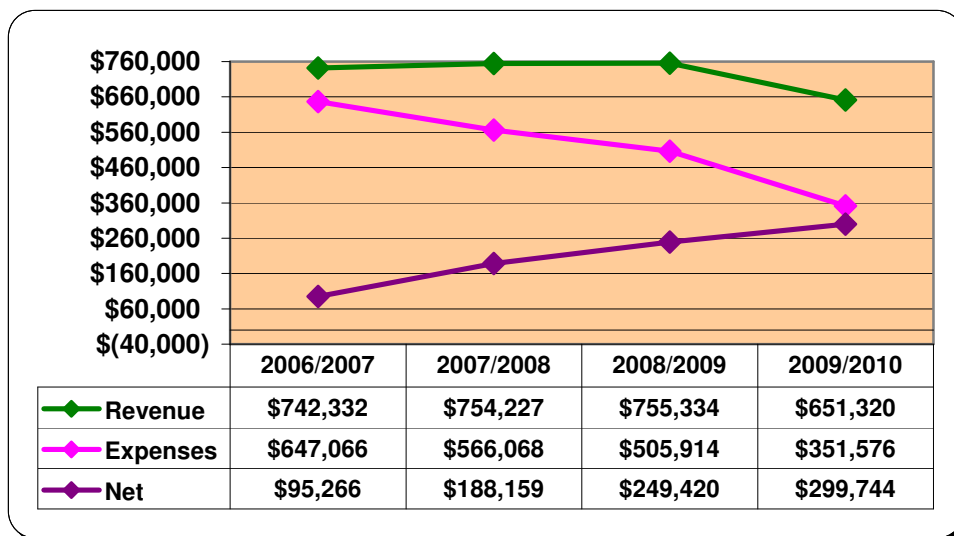
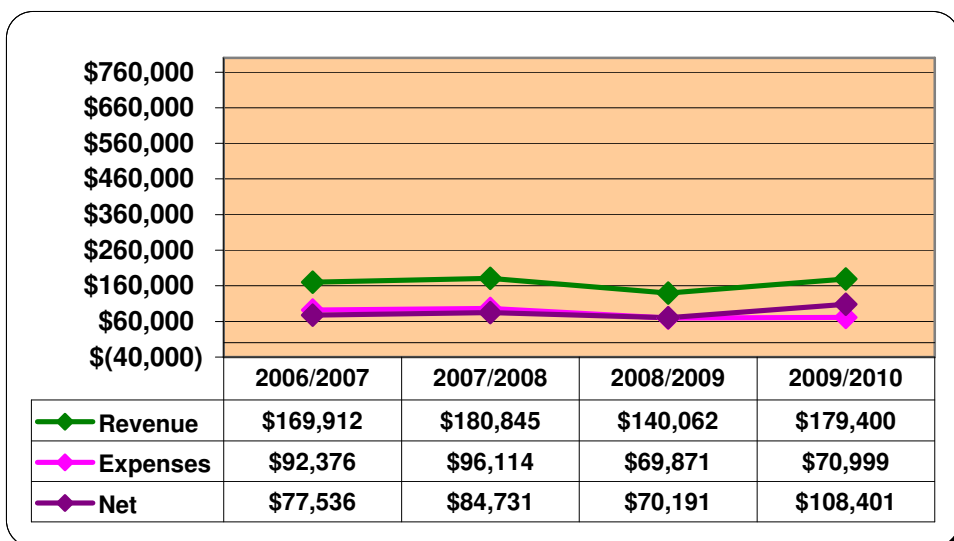
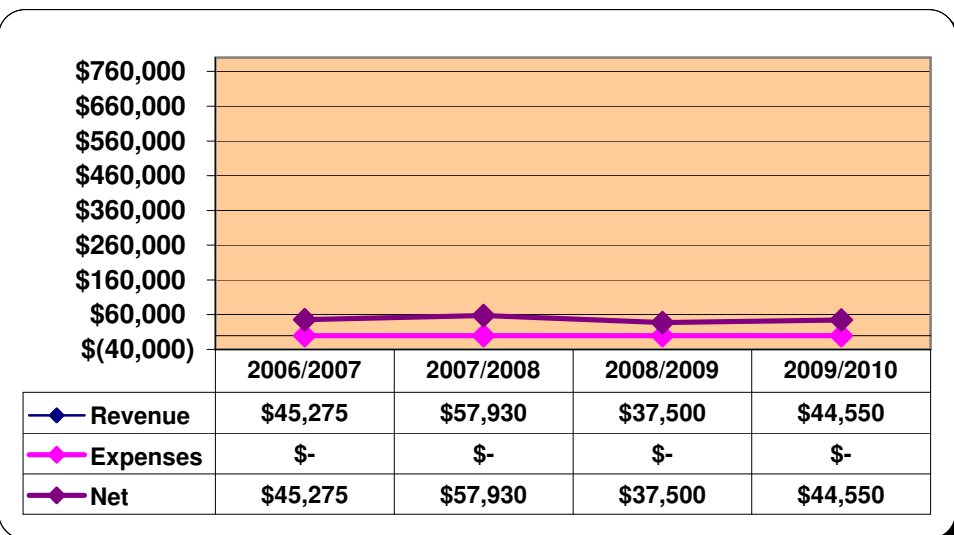
Expenses



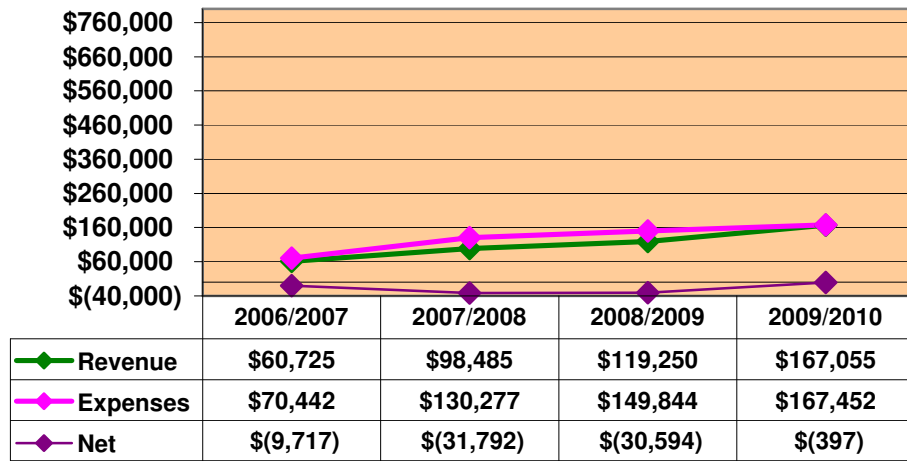
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AACRAO Business Lines – Comparative Data

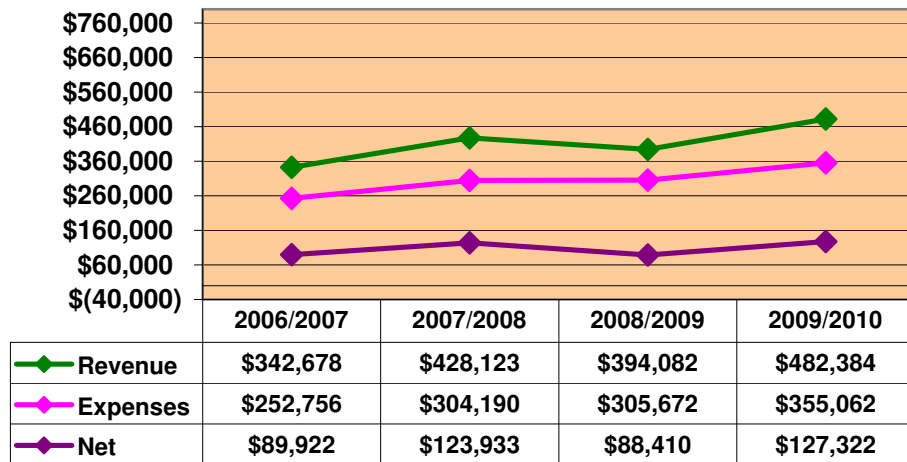
The following charts compare year-to-date department activities over the past four years:

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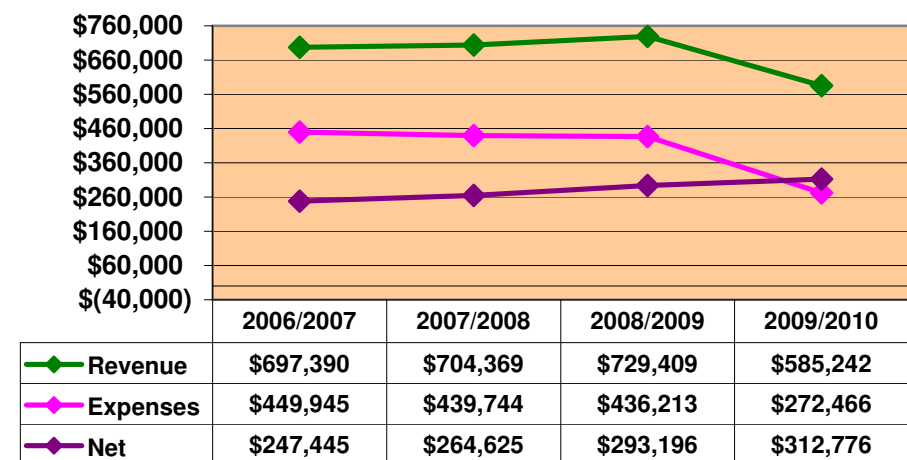
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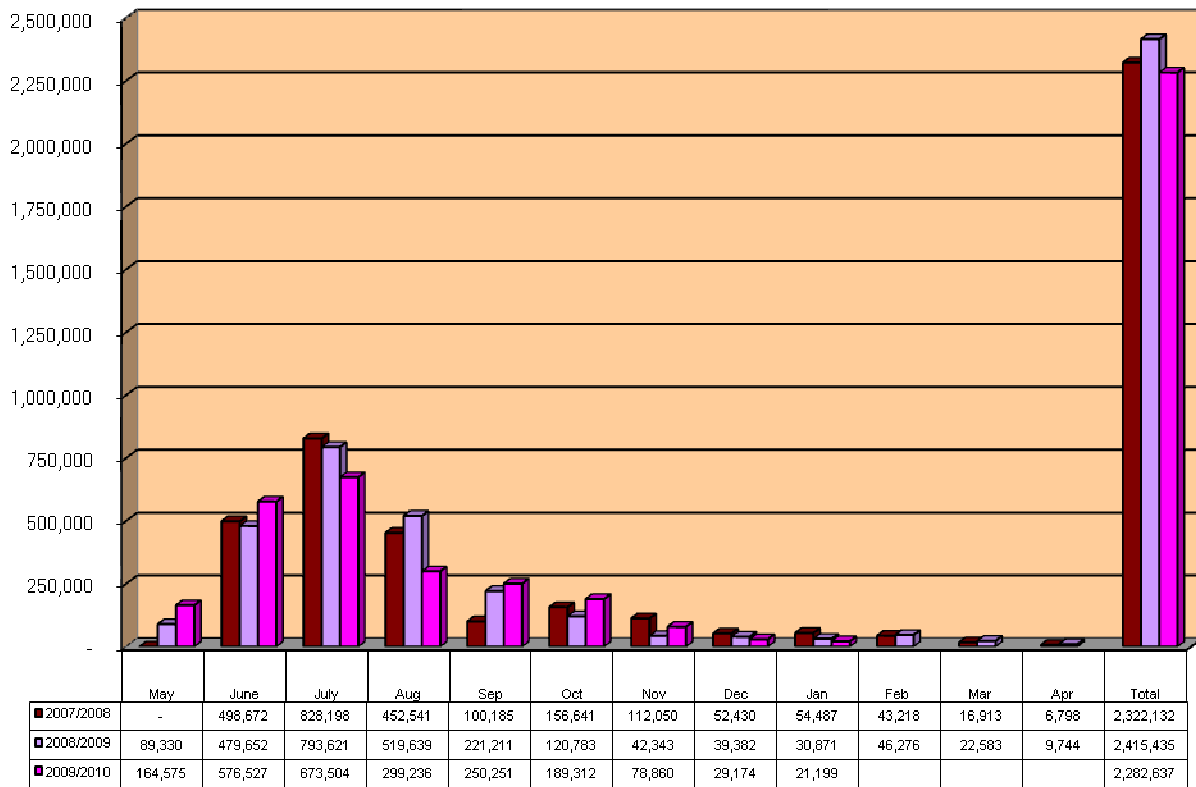


SEM

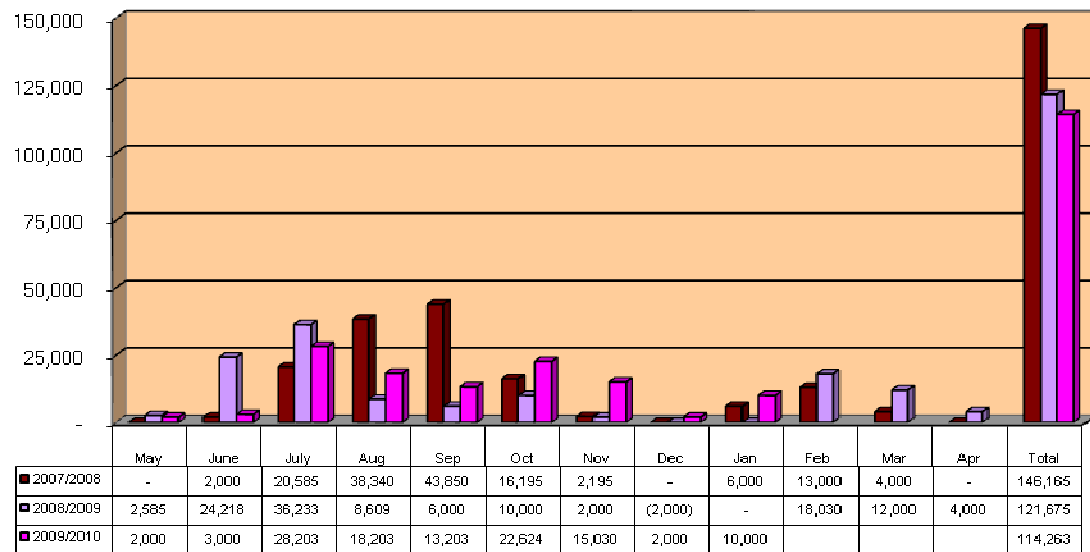


Appendix

Membership Dues: Cash Collections | Comparative Numbers



Corporate Dues: Cash Collections | Comparative Numbers



AMERICAN ASSOCIATION OF COLLEGIATE REGISTRARS AND ADMISSIONS OFFICERS

PROGRAM REVIEW AND DEVELOPMENT COMMITTEE

Minutes of the Meeting of 25 February 2010

In Attendance: Glenn Munson, chair
Sam Conte
Michelle Sandlin
Brad Myers, Nominee and future member of committee

Location: AACRAO Headquarters

The Program Review and Development Committee met as part of the February 2010 Board of Directors meeting.

The Committee was assigned an action item to “look at reinstatement of the Leadership Meeting.” In response to that assignment, the Committee corresponded via email during the previous month in order to reach an understanding of the issues and possible outcomes.

In this meeting, the Committee discussed several concerns about the December Leadership meeting, including cost to the Association, attendance, and the agendas of the two portions (or tracks) of the meeting. While initially it was evident that there was concern about the cost of bringing to Washington all of the PAC chairs, the Program Committee, and the State and Regional leaders, it was clear that such a meeting was a benefit to both the Association and the participants. Options were discussed, leading to the following conclusions:

1. The Committee recommends that the December Leadership Meeting be reinstated for the Program Committee and the incoming chairs of the PACs.
2. The State and Regional Leadership Workshop should become an annual event at the Annual Meeting. The workshop should begin on the day before the pre-conference workshops (just as REG 101 does this year.) That portion of the workshop would be for the president of each regional and consist of a half-day, afternoon meeting. That schedule would necessitate those leaders to arrive in the conference city one day early; AACRAO would pay of that extra hotel night.
3. The S&R Leadership Workshop would continue the next morning with any other leaders from the regionals being invited. Adjournment of the workshop after the morning session would allow those members to attend the PAC meeting that afternoon.
4. The agendas of both the December State and Regional Leadership meeting and the State and Regional Workshop at the Annual meeting should be reviewed in order to include the most significant portions of each into one meeting which would then be held at the Annual Meeting.
5. This timing of the S&R Leadership Workshop would allow the Board to draw upon other AACRAO members to take part as facilitators depending on expertise.
6. The Committee would like to have a few minutes at the S&R Workshop in New Orleans to seek feedback from its participants about this concept.

President-Elect Report by Betty Huff
AACRAO Board Meeting
Feb. 26, 2009

The 2010 Program Committee continues to work on the Annual Meeting Program with no problems. There are the usual substitutions and corrections, but they feel comfortable with the program as it moves forward.

The Program Committee has prepared an agenda for the special meeting in New Orleans that will substitute for the canceled December leadership meeting. Nora as President-Elect nominee and Betty as President will have the first 30 minutes of the meeting with the Program Committee and the 2010-11 PAC Chairs to discuss some AACRAO leadership items. The PC Chair will conduct the rest of the meeting that will focus on PAC work with the Program Committee.

A special folder, pen, and flash drive will be given to all in attendance, including attendees at the S&R meeting.

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INFORMATION TECHNOLOGY (IT)

AACRAO AMS/CRM Upgrade

AACRAO completed phase two of the Matrix Maxx AMS (Association Management System) / CRM (Customer Relations Management) system. All membership modules (institutional, corporate, committees and voting) have been upgraded to the new Maxx version. AACRAO is currently working on phase three of the Matrix upgrade, which includes the Sessions application for meetings. Phase three will be completed in time to debut the upgraded Sessions database for use at the Annual Meeting in New Orleans.

Cloud Computing

AACRAO successfully completed migration of its in-house email system to Google Apps (Gmail). This is the first step of AACRAO's strategy to source commodity information systems in the cloud. The move to cloud computing will save the Association substantial infrastructure and support costs, and free up IT personnel to research and identify emerging technologies of key strategic importance to the Association. Because AACRAO qualifies as an educational entity, Google offers the entire suite of cloud computing applications free of charge. AACRAO is now investigating cloud sourcing for file storage, office productivity and telephony.

Project ÆOn

AACRAO completed the physical database design for the new AACRAO Evaluations Online (ÆOn) web application. ÆOn will serve as a powerful web-based tool for IES evaluators to process Foreign Credential evaluations. Next steps involve designing a flexible and extensible software development tool to produce and modify the user interface, and programming the evaluation outputs.

Webinars

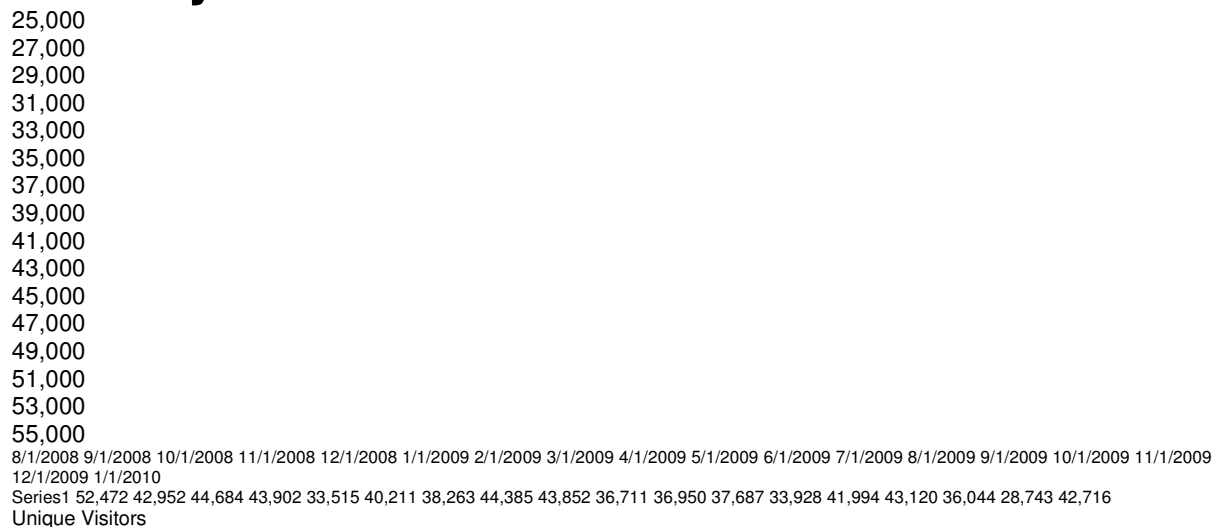
AACRAO produced two webinars over the winter months: a video webinar with LeRoy Rooker on FERPA and a Sungard Higher Education sponsored webinar on SEM and Community Colleges. AACRAO renegotiated its contact with On24, the current webinar partner, for more competitive rates on live webinars. AACRAO also plans to continue using high quality, low cost, in-house technology to provide recorded video events such as the upcoming Virtual Annual Meeting. AACRAO is also evaluating competing media technologies such as Adobe Connect as possible alternatives for providing live webinars.

Member Satisfaction Survey

AACRAO successfully conducted a survey measuring members' satisfaction with Association services. The last membership satisfaction survey took place in December 2008.

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AACRAO.ORG Unique Visitors August 2008 – January 2010



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General Operations

AACRAO Staff and McQuade Brennan received the results of the auditors review of the previous fiscal year's financial operations. No findings or irregularities have been noted

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-20%
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Jan
10

Net Profitability
(Net Revenue/Gross Revenue)
January 2009 - January 2010

AACRAO

FINANCIAL DASHBOARD

January 31, 2010

Revenue, Expenses & Operating Surplus/Deficit
January 2009 Actual, January 2010 Actual and Budget

(\$200,000)

\$300,000

\$800,000

\$1,300,000

\$1,800,000

\$2,300,000

\$2,800,000

Revenue Expenses Operating

Surplus/Deficit

Jan 09 Actual Jan 10 Actual Jan 10 Budget

\$0

\$250,000

\$500,000

\$750,000

\$1,000,000

\$1,250,000

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09
Jan 10
Long-Term Investments - FMV
January 2009 - January 2010
Endowment Infrastructure Strategic

0.99
1.30 1.00
-

1.00
2.00
3.00
4.00
5.00

AACRAO Industry
Current Ratio Analysis
(Current Assets/Current Liabilities)
Comparison of AACRAO with Industry Average
Jan 09 Jan 10

(\$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

Jan 09 Feb 09 Mar 09 Apr 09 May
09

Jun 09 July 09 Aug 09 Sept
09

Oct 09 Nov 09 Dec 09 Jan 10
Cash Receipts, Disbursements & Net Cash Surplus/Deficit
January 2009 - January 2010
Cash Receipts Cash Disbursements Net Cash Surplus/Deficit

SUMMARY

AACRAO's year-to-date net operating results are showing a surplus of \$516,984, which is \$579,290 over YTD budget expectation and \$362,111 over results of the same period last year (four months ended January 31, 2009). Overall, the Association fairs well in comparison with industry and past performance.

FY 08/09 Margin = 7%

Industry Avg. = 5%

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General Operations

AACRAO staff and the National Student Clearing House continue to develop their joint international initiative. Roll out date has been delayed by 30-45 days because of NSC competing priorities

AACRAO Staff and IT have initiated a phased training program for external users of the email and database system

AACRAO Staff and McQuade Brennan have completed the initial FY 2011 budget

AACRAO Staff, the Executive Director, and McQuade Brennan conducted a review of first quarter (FY 10) budget performance

AACRAO has contracted with the University of Delaware to provide credential verifications of prospective students

ANNUAL MEETING

Annual Meeting

New Orleans

Registration for the 2010 AACRAO Annual Meeting in New Orleans is currently pacing about a week behind registration last year at this same time. Hotel reservations are also behind,

but because we greatly reduced our hotel block, our percentage is about 10% ahead of where we were last year at this same time. There are currently 619 people registered for the meeting. As of February 8, the hotel pick up is 63% of the total block among the three hotels (2,984 of 4,738 total rooms). Compared to last year, we never achieved 63% of the hotel block. Last year, we had a total of 9,416 rooms blocked. This year, we reduced the hotel block to 4,738 total rooms, a reduction of 50% of the total block. So far, 108 tickets for the Centennial Dinner have been sold, which is 17% of all attendees.

The Annual Meeting Brochure is online, as we have now secured the featured speakers for the meeting. We will continue to market the Annual Meeting in Memberlink and in standalone e-mail blasts.

AACRAO Centennial

Current marketing activities surrounding the Centennial include the Centennial montage and video for the 2010 Annual Meeting. Senior leaders at AACRAO are applying the final touches. The Centennial Chair continues to work with the team as needed. Planning for the Centennial evening is in full swing. A portion of the dinner/event is sponsored by CollegeSource. We will have a "living room" area for people to visit honorees, retirees and past presidents. We will also have a Centennial corner and museum. President Simpson-Munson sent a letter to all past presidents of AACRAO inviting them to the Centennial for the past presidential event during the opening session. Other highlights include: the Centennial mural, which is near completion; a series of regular articles in MemberLink examining key events in AACRAO's history; efforts to cultivate additional corporate sponsors for the Centennial.

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President Simpson-Munson also sent an individual invitation and a new Centennial membership pin to include all members in the celebration.

Annual Meeting Webinars / Virtual Meeting

AACRAO will continue offering a slate of ten webinars from the upcoming annual meeting. We hope to offset the projected drop in Annual Meeting revenue while providing a valuable service to members whose own budget constraints prevent them from attending.

Annual Meeting Attendee Demographics

Below are the self reported (unverified) data collected through the registration system for attendees currently registered to attend the 2010 AACRAO Annual Meeting. Percentages are based on the number of attendees reporting in each topic. In topic areas marked with an * attendees can select more than one category.

Topic Category % of Attendees

Attended 2009 Annual Meeting: Yes 53%

No 47%

Area of Responsibility*: Enrollment Management 17%

Records/Registration 35%

Academic Advising 6%

International Admissions 5%

Institutional Research 4%

Admissions 14%

Financial Aid 4%

Student Affairs 5%

Computer/IS 3%

Other 8%

Title: President/Chancellor 1%

Vice President 3%

Associate/Assistant Provost 2%

Associate/Assistant Vice President/Chancellor 3%

Director/Registrar 43%
Associate/Assistant Director 18%
Other 31%
Full-time Enrollment: Under 1,000 9%
1,000 – 2,499 13%
2,500 – 4,999 12%
5,000 – 9,999 14%
10,000 – 19,999 15%
20,000 + 27%
None of the Above 10%

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Exhibits

New Orleans

We now have 70 companies exhibiting at the Annual Meeting. There are 146 booths in the hall and we have sold 117 of those booths. This represents 80% of the hall being sold. The new companies are:

Prometric
Oracle
Inside Higher Ed
Army Recruiting
Hershey Systems
Mongoose Research Inc
GradesFirst
RightNow Technologies
Zinch
Royall & Company
Evisions
InfoCision

Of the companies exhibiting at the annual meeting, 34 are corporate members and 34 are non-members. We anticipate additional companies becoming members or renewing their membership after receiving their invoices charging them the higher non-member rate. We have sold fifteen corporate presentations. The following companies are presenting:

Oracle
Educational Testing Service (ETS®)
Infosilem
Hershey Systems
Perceptive Software (ImageNow)
Mongoose Research
SunGard Higher Education
Datatel
National Student Clearinghouse
Jolesch Photography
Runner Technologies

MEMBER SERVICES

Member Maintenance

2009/2010 Membership Cards

Golden Key International Honour Society sponsored the membership cards for a third consecutive year for \$11,000. The mailing was reformatted, cutting costs by \$2,000. In an effort to increase individual members from member institutions, information on additional

memberships was included with the mailing, sent on October 10, resulting in 8 additional members to date.

Membership Renewal 20092010

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For the 2009-2010 membership year, we anticipated a revenue loss of 10% due to the economic downturn and due to the change in dues calculations from [Full-Time Enrollment + ½ Part-Time Enrollment] to [Full-Time Enrollment + 1/3 Part-Time Enrollment]. As of January 31, 2009 we have seen a dues loss of only 2.35% when compared to the same time last year.

Recruitment Campaign to Past Members

We have continued to send renewal information to dropped members from the past eight years. This project has proven to be very successful. So far this year, 54 institutions have renewed with \$28,826 in revenue (last year a total 44 institutions renewed with \$24,821 in revenue).

Collections 20092010

In January, an email was sent to all unpaid, past and canceled roster members about renewing and receiving the Early Bird discount and member discount at the Annual Meeting. In February, a final email was sent to the same individuals about renewing and receiving the member discount at the Annual Meeting. In addition, a final round of phone calls was placed, and faxed invoices were sent to all primary contacts at unpaid institutions.

Call for Award Nominations

The call for awards nominations began in September with twice weekly advertisements in MemberLink and Transcript, and ended on December 30. The award recipients will be recognized at the Opening General Session at the Annual Meeting in New Orleans on April 21, 2010. The recipient for the Award for Excellence in International Education will be Dr. Cliff Sjogren. Other award winners have yet to be confirmed. As in years past, SunGard Higher Education will sponsor the APEX award and Jostens will sponsor all other plaques and certificates.

AACRAO Committees

As part of the Annual Meeting registration form, registrants are asked if they are interested in serving on a committee. These names are passed on to AACRAO Committees, and each individual is contacting regarding their request and invited to apply for a committee. At the New Orleans Annual Meeting, the committee interest booth will be placed adjacent to the Bookstore, in order to provide interested attendees with personalized attention and expertise from AACRAO staff, and the opportunity to fill out committee application form onsite.

AACRAO Committees is continuing to work with a timeline formulated with President Simpson-Munson, in order to ensure that all committee participants are kept abreast of their roles and schedules throughout the year.

Retention and Recruitment

Potential Members from Phone Calls and Emails

Since October, 22 institutions and individuals contacted us directly via phone or email from regarding AACRAO membership. Of these, three additional members have joined.

Outreach to Institutions Utilizing Consulting and Publications

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AACRAO Membership is working with AACRAO Consulting and AACRAO Publications on contacting non-member institutions that have utilized AACRAO Consulting and purchased publications in recent months. Recently, targeted membership information has been sent to Allan Hancock College, City College, Delta Connection Academy, Fanshawe College, Kalamazoo Valley Communitiy College, Marion Technical College and Shelton State

Community College.

Outreach to Webinar Attendees

Membership information was sent to following non-member attendees of AACRAO Webinars:

Update Your Knowledge of FERPA: What You Really Need to Know About the Revised Regulations, December 2009 - Goldfarb School of Nursing

Applying SEM at the Community College, January 21, 2010 - Illinois Valley Community College and Marion Technical College

19th Annual Strategic Enrollment Management Conference, November 8-11, 2009

Membership information was sent to the following non-member attendees:

Assiniboine Community College

Bethlehem College & Seminary

College of the North Atlantic

Dallas Nursing Institute

Gateway Community College

High-Tech Institute

Morgan State University

Orange Coast College

Pontificia Universidad Javeriana

Red River College

Tri-County Technical College

Uniformed Services University of the Health Sciences

University of Applied Sciences Zittau/Goerlitz

University of Los Andes

University of the Ozarks

Zayed University

Jobs Online

A new site for Jobs Online went live in mid-November. The site is being populated with resources for job-seekers and employers, and will be launched to our members in February. Members will receive a monthly update with news on recent jobs postings and relevant articles on employment and higher education. The Jobs Online posting fees were raised for the first time since 2003, and pricing for non-members will be implemented in February, with a 20% increase on member fees.

Outreach efforts are being made weekly to all institutions and companies advertising higher education jobs in publications including the Chronicle, Inside Higher Ed, AACC, NACUBO, NACAC, NAFSA and NASFAA. In January, this resulted in 3 additional postings in Jobs Online.

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RESEARCH

Surveys distributed since December update:

-AACRAO Member Satisfaction survey. Longitudinal data have been prepared compared this survey with previous ones.

-(In connection with Microsoft, a survey on the use of online reputations in making admissions decisions. They are preparing a report which will be shared with us.)

Reports being prepared:

-Transcript practices. The two surveys (one on practices, the other about opinions of best practices) on transcript notations and policies regarding use of Social Security Number, use of e-mail for notification of an academic decision, and requirements for making name changes have been closed and are being analyzed, with reports scheduled for late February.

-U.S. admissions policies for applicants with criminal records or disciplinary histories

(behavioral or academic) from other institutions. Final reports on both versions (undergraduate and graduate) of the survey on U.S. institutions' admissions policies for applicants with criminal or disciplinary records should be ready for late February.

- AACRAO developed the survey in collaboration with the Center for Community Alternatives (CCA), a non-profit criminal justice agency that provides services and helps develop public policy on individual and community development, violence prevention, public safety, recovery and reintegration.

- College credit. A report on the survey on college credit for college-level courses in high school, noncredit courses, and testing out will be out in early April.

New surveys being developed/considered:

- Working relationships among administrators and faculty

- Roles of individual members according to their titles

- Leadership qualities sought in enrollment management heads at different types of institutions

MEETINGS AND WORKSHOPS

Registrar 101

New Orleans

A Registrar 101 Workshop will be held in conjunction with the 2010 AACRAO Annual Meeting in New Orleans. This year, we are trying a new format. The workshop will start on Tuesday afternoon, April 20 from 2:00 – 5:00 p.m. It will continue with the rest of the full day workshops on Wednesday, April 21.

Strategic Enrollment Management Conference

Nashville

The 2010 SEM Conference will be held in Nashville, Tennessee, November 7-10, 2010. Last year the SEM Conference Director, Bob Bontrager further developed the programmatic content by bringing on Jay Goff, Vice Provost & Dean of Enrollment Management, Missouri University of Science and Technology and William Serrata, Vice-President for Student

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Services & Development, South Texas College (4 year and 2 year respectively). This year we have added Susan Gottheil, Associate Vice President, Enrollment Management at Mount Royal College, to assist with strengthening the Canadian track.

Executive Symposium/Forum

Nashville

After convening the 4th Annual Executive Symposium, “The Keys to Effective Enrollment Leadership,” in 2009 the AACRAO SEM Director Bob Bontrager plans to enhance the concept by holding an Executive Forum one day prior to the SEM Conference. The Forum will focus on issues such as access, equity, and challenging rankings that are of critical importance to senior executives and are of broader interest to the higher education community. The targeted attendance for the new forum will be 200. Jay Goff is working with Bontrager to develop the programmatic content. Marketing for next year’s event will develop a consistent image for both AACRAO SEM and the Executive Forum. Our target audience will include vice presidential officers, provosts, chancellors, and other senior campus executives as well as thought leaders throughout higher education in the areas of access and equity. In future years, the Symposium and Forum formats will be alternated to ensure that content is varied and encourages repeat attendance.

Technology Conference

Kansas City

The Call for Proposals was sent out December 30 with a deadline of March 1. A follow-up call for proposals email was sent out January 26. Additional reminders have also been

posted in Memberlink. Registration is on track to open in early March. It has been decided to hold a Registrar 101/FERPA Workshop in conjunction with this meeting.

Ad Astra is the first exhibitor to sign up for the conference.

Transfer Conference

The Transfer Conference was held February 14-16, 2010 in Chicago, Illinois, and explored the key issues in transfer enrollment and evaluation of transfer credit. "Academic Mobility: Perspectives on the Future of Transfer" is the marketing theme for this conference. The plenary speakers for the conference include: Jack Scott, Chancellor of the California Community Colleges System; George Gollin, Professor of Physics at Illinois University; and Barmak Nassirian, Associate Executive Director at AACRAO. Registration for Transfer was at 316, including AACRAO staff and corporate registrations. CollegeSource and redLantern cosponsored the conference and both have agreed to continue their corporate sponsorships for 2011. Marketing was conducted through AACRAO IT, the Memberlink and Transcript newsletters, and banner ads in Inside Higher Ed and the Chronicle of Education. CollegeSource and redLantern also provided marketing support for the conference. Lee Furbeck, Transfer Conference Director, selected a significant number of high quality sessions for the 2010 meeting.

Transfer Conference Attendee Demographics

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Below are the self reported (unverified) data collected through the registration system for attendees currently registered to attend the 2010 AACRAO Transfer Conference.

Percentages are based on the number of attendees reporting in each topic.

Topic Category % of Attendees

Attended 2009 Transfer Conference: Yes 15%

No 85%

Area of Responsibility*: Enrollment Management 6%

Records/Registration 22%

Academic Advising 8%

Institutional Research 2%

Admissions 34%

Student Affairs 7%

Computer/IS 1%

Other 21%

Full-time Enrollment: Under 1,000 5%

1,000 – 2,499 10%

2,500 – 4,999 15%

5,000 – 9,999 13%

10,000 – 19,999 22%

20,000 + 27%

None of the Above 9%

Institution Type: Four-Year Public 34%

Four-Year Private 40%

Two-Year 11%

Graduate or Professional 5%

Other 11%

Organization Type: Educational Institution 95%

Non-Profit Organization 3%

Government Agency 1%

Corporation/Consultant 1%

We have 6 companies exhibiting at the Transfer Conference. The companies are:

CollegeSource

redLantern
Smart Catalog
Perceptive Software (ImageNow)
National Student Clearinghouse
World Education Services (WES)

Four corporate presentations have been sold to date. The following companies are presenting:

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SmartCatalog
National Student Clearinghouse
CollegeSource
Perceptive Software (ImageNow)

Corporate Membership

The marketing team is preparing to renegotiate Strategic Agreements for 2011 with SunGard, SPSS, and EMASPro to provide them with opportunities to achieve heightened brand visibility at all of AACRAO's conferences. We also met with the executive staff from SPSS in Chicago during the Transfer Conference. Conference calls will take place in the upcoming weeks with the President of EMASPro and executives from SunGard Higher Education. AACRAO marketing will also be meeting with a representative from the NCAA at the Transfer Conference to expand that partnership. We are attempting to identify a sponsor for AACRAO's Technology Conference.

The staff is working to renew and recruit corporate memberships (this normally happens when they pay for exhibiting at the annual meeting). Two additional companies have renewed their 2009-2010 membership:

1. Hershey Systems
2. Oracle

Two new companies have joined AACRAO as corporate partners:

1. Greenwood & Hall
2. Mongoose Research

Senior Leadership Institute

AACRAO Staff is supporting President Elect McLaughlin and Past President Wiley to market a new Senior Academic and Enrollment Services Institute in collaboration with Vanderbilt University. The Institute is designed for professionals with a minimum of 5 years experience in a senior level position. The intensive training will be offered on the campus of Vanderbilt from June 27-July 1, 2010. AACRAO leaders will assemble a nationally recognized faculty bringing diverse areas of higher education expertise. Fellows attending the institute will join a growing network that will reconvene at AACRAO Annual Meetings. Admission to the institute is very competitive; Vanderbilt faculty will select only 25 fellows each year. AACRAO and Vanderbilt have jointly marketed the institute, utilizing internal and external marketing channels. Marketing is executing a co-branded marketing strategy to underscore the partnership between AACRAO and Vanderbilt, and promoting the Institute through higher education websites, Memberlink, Transcript, C&U, HEP Directory email blasts, and banner ads within Higher Ed publications.

Webinars

AACRAO Staff is working with the Annual Meeting Program Committee to identify ten sessions to tape at the 96th Annual Meeting and present as a *Virtual Annual Meeting*. The sessions provide

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training opportunities for those who cannot attend and to allow attendees to train their colleagues back at home. The Virtual Annual Meeting will include video, audio, and synchronized PowerPoint, which can be viewed online by staff members for a period of six months. Additionally there will be PDF copies of presentations and handout materials available. Prices are

\$350 for members, \$450 for nonmembers, and \$199 for meeting attendees. We are in discussion with SunGard Higher Education about sponsoring the Virtual Annual Meeting Webinars.

General Marketing/Outreach

AACRAO recently exhibited at the following meetings:

SACRAO, Chattanooga, TN – January 31- February 2, 2010 and at the AACRAO Transfer Conference, Chicago, IL – February 14-16, 2010.

PUBLICATIONS

GENERAL PUBLICATIONS

Our newest title, *Retention of Records 2010* was released on January 27, 2010 and sold 130 copies in the first week. *Sharing the Campus Experience: Hosting Effective Campus Visits* was released December 8, 2009 and has sold 101 copies as of January 31. We have several works in progress that are currently receiving our attention. Two partial manuscripts have been delivered and are now in the editing process. As of February 11th, we've received three out of six chapters of *The 2010 FERPA Guide*, which is scheduled for release at the Annual Meeting in New Orleans and fourteen out of twenty-one chapters of the *International Guide 2010 Update*, which is scheduled for release at the NAFSA Conference in the Summer of 2010.

We have completed our inventory reduction of old international publications, thereby simplifying our catalogue, reducing storage space at our distribution center, and directing international sales toward our electronic EDGE publication. We have begun comparative research on fulfillment centers in an effort to reduce operational costs.

In the marketing arena, we have expanded our Amazon Marketplace catalogue so that fourteen AACRAO publications are now available for sale. We saw an increase in January sales as a result. Sample publications were exhibited at the SACRAO Conference January 31 - February 3, 2010, in Chattanooga, Tennessee and the 3rd Annual Winter Institute for International Admissions, January 25-27, 2010 in Washington, DC. Publications will be available for sale at the AACRAO Transfer Conference in Chicago, February 14-16, 2010. A month long Holiday Book Sale was held from December 11, 2009 to January 11, 2010 and resulted in \$3,198 in revenue. Four publications were advertised at no cost in European Association for International Education (EAIE)'s Forum Magazine Spring Issue. In the 2010 Annual Meeting program, a related publications field will be included with each session, through which we can suggest appropriate publications to session attendees. Finally, an email blast advertising the 2010 Retention of Records was sent to non-member registrars and admissions directors using HEP data.

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GOVERNMENT RELATIONS/COMMUNICATIONS

Government Relations

Budget Reconciliation and 2010

The President's FY 2010 budget proposal, included in a large budget reconciliation bill, remained unresolved through the end of 2009 and is still pending before the Senate. The House has already voted out its education bill, which substantially follows the Administration's proposals. While unofficial drafts of the Senate bill generally tracked the Administration's proposals, uncertainty about healthcare reform has created enormous uncertainty about the Senate bill's prospects. In addition to political difficulties, the bill also faces a Congressional Budget Office cost-score re-estimate that is likely to price its expenditures on Pell Grants at substantially higher levels than the original budget score for the 2010 budget resolution. Congress can still enact a bill that realizes the original forecast's \$87 billion in savings if it acts before it approves the 2011 budget resolution.

FY 2011 Budget Request

The Administration's \$3.8 trillion FY 2011 budget calls for increases in federal spending on education, despite the net spending freeze on discretionary domestic spending announced by the president last week, reports the Chronicle of Higher Education.

Under the administration's proposal, most programs that serve colleges and students would fare well, particularly in comparison to other domestic discretionary expenditures. The budget would increase federal education spending by 6 percent in 2011 and raise the maximum Pell Grant to \$5,710, from the current \$5,550. Obama also renewed a proposition to make the Pell Grant program a guaranteed entitlement for all low-income students.

President Obama has proposed a \$66 billion budget for nondefense research and development projects, including a \$1 billion increase for the National Institutes of Health – the largest increase for the agency in eight years, excluding the funds provided in last year's stimulus legislation.

Not all higher education-related programs benefit from the proposed budget, though. The administration will hold funding for many student aid programs (other than Pell Grants) at their 2010 levels, decrease the budget for the National Endowment for the Humanities, and end a \$125 million grant program for community colleges.

State Longitudinal Data Systems

The Department of Education has announced that it will convene a panel of privacy experts to review federally funded State Longitudinal Data Systems' privacy practices. The panels appear to consist mostly, if not solely, of advocates for such data systems and, as of this writing, exclude critics of the plans and privacy advocates. AACRAO has not been invited to join the panel.

In a somewhat related development, the newly hired director of the Family Policy Compliance Office was dismissed from his position in January. There has been some speculation that his removal was motivated by the Administration's desire to circumvent FPCO's interpretation of FERPA's restrictions on data sharing.

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Negotiated Rulemaking

The negotiators in the rulemaking process to update program integrity regulations for Title IV failed to reach consensus, thus allowing the Department to publish proposed regulations on the basis of its best judgment. On virtually all issues of relevance to AACRAO members, particularly incentive compensation and definition of high school diplomas, the Department's final position was nearly identical to positions advocated by AACRAO.

Communications

AACRAO media relations efforts continue to very prominently feature the Association before the public. AACRAO was mentioned in approximately 200 media outlets since June. Our media relations efforts have successfully communicated the AACRAO public policy positions.

SEM Source

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 SEM Source articles include: **Partnering for Success: A Collaborative Approach to Student Persistence** by Jody Gordon and Joshua Mitchell, Kwantlen Polytechnic University; **From Concept to Reality: SEM Organizational Structures with RealWorld Applicability** by Alicia Moore, Central Oregon Community College; **Let's Get Organized:**

Your Personal GPS to Improving Organizational Skills by Janet Ward, Seattle Pacific University; **SEM in action: A centralized service model to meet student demand** by Kristine Duffy, Onondaga Community College; and **Feast or Famine: Keys to Engaging Faculty in Strategic Enrollment Management** by Becky Dunn, Linn State Technical College, Mike Kosher, Lincoln University, Christopher T. Sutton, Lincoln University, and Stephanie Schuelen, Linn State Technical College.

SEM Source articles have been featured regularly in Memberlink. SEM Source has been advertised in C&U and in AACRAO conference programs, and has been re-circulated in AACRAO consulting marketing.

The SEM Source database includes more than 400 feature articles.

PROJECTS/CONTRACTS

Consulting Services

From October 1, 2009 to January 31, 2010, AACRAO Consulting (AC) has actively worked with 63 institutions which have resulted in 28 signed consulting projects.

FY 2010

Pub 4yr Pub 2r Pri 4yr Other Total

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Inquiries 23 8 23 9 63

Proposals 18 7 15 8 48

Contracts 12 2 10 4 28

Contracted fees \$201,525 \$12,460 \$112,625 \$103,000 \$ 429,610

Avg. Fees/Contract \$15,343

AC continues to work with the marketing firm StudioELREY on a Strategic Marketing Initiative designed to increase the number and size of consulting projects. Current actions associated with the initiative include sending specialized messages to strategic market segments, and distributing those messages via email and postcards.

Effective in January, AC signed an agreement with Hobsons, Inc. to deliver SEM assessments in association with Hobsons' EMT Connect clients. EMT Connect is one of the most popular bolt-on CRM systems to support recruitment and retention.

A webinar based on the new AACRAO publication *Applying SEM at the Community College* publication was held in January 2010. AACRAO consultants Alicia Moore and Bruce Clemetsen, who also served as contributing authors, presented the webinar.

INTERNATIONAL EDUCATION SERVICES

IES

The numbers of requests for credential evaluations continue to increase during the current fiscal year. From October, 2009 through January, 2010 requests have increased 30.5% over the same time period from the previous fiscal year.

Quintina Conway rejoins IES in mid-February replacing the late Linda Kosene as Associate Director (IES) of Marketing and Institutional Liaison.

Though the recently completed Winter Institute for International Transfer of Credit only had 14 participants they, as a group, were particularly engaged in the training program. We believe the loss of Linda Kosene and her marketing efforts regrettably adversely affected the number of participants enrolled. Even with the low enrollment the Winter Institute did enjoy modest excess revenue.