



PA State System of Higher Education Board of Governors

Effective: July 11, 2024

Page 1 of 2

Policy 2024-01: Undergraduate Recruitment and Financial Aid Optimization Annual Assessment

See Also:

Adopted: July 11, 2024

RESOLUTION 2023-02 Exercising the Fiduciary
Responsibility of the Board of Governors for
Efficient, Effective, and Financially Sustainable
Universities

A. Purpose

In accordance with the Board of Governors fiduciary responsibilities, including but not limited to the short- and long-term financial health of the State System and the vitality of its mission for future generations of Pennsylvanians, the purpose of this policy is to ensure universities maintain highly functional new undergraduate student enrollment operations through effective recruitment and admissions practices, enrollment marketing efforts, research, and fiscally responsible financial aid optimization models, which are key drivers for university sustainability.

These operations should be aligned with university-wide planning and industry standards and best practices and reviewed by the university on a regular basis for continuous improvement.

B. Policy

1. Each university within the system shall administer enrollment management functions in adherence to best practices, benchmarked against a set of standards collaboratively developed and outlined in a System Procedure and Standard.
2. Universities shall conduct periodic assessments of their enrollment management functions against the established standards. The frequency of assessment submissions, timing, format, and reporting mode shall be defined in a System Procedure and Standard.
3. Assessments must encompass, at a minimum, evaluations of marketing, admissions, and financial aid capabilities, with a focus on supporting enrollment projections and university aid and/or pricing strategies that flow into university planning.

4. Based on the assessments, universities should prioritize actions for continuous improvement.
5. If, as part of the assessments, or if financial or operational circumstances dictate the need for immediate action, the chancellor/designee, in consultation with the Presidents, may require additional assessment, external assistance and actions.
6. In the event that a university submits a tuition proposal in accordance with Policy 1999-02-A Tuition, the assessment findings may be provided to the Board to aid in its decision-making process.

C. Implementation

The chancellor, in consultation with the Presidents and Board of Governors as appropriate, shall promulgate procedures, standards, related policies and guidelines as necessary to ensure proper implementation of this policy.

This policy is effective immediately.