Strategic enrollment planning phases

1. Preparation
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3. Developing a comprehensive situation analysis (data compilation, research, the SEP dashboard, etc.)
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Session overview

- Tips for Developing Your Plan
- Managing Execution
- Evaluating and Modifying the Plan
Tips for Developing Your Plan

Begin with the end in mind

Documentation planning from day one

Sample table of contents

- Introduction and Executive Summary
- Organizational Structure for Planning and Focus
- Situation Analysis
- Mission, Vision, Key Performance Indicators, and Planning Assumptions
- Strategies and Priorities for Action
- Enrollment Goals, Projections, and Return on Investments
- Future Structure to Monitor Enrollment Management
- Closing Comments

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Pulling It All Together: The Plan Itself

Lew Sanborne

Plan or Appendix?

The Plan
- Situation analysis overview
- Overarching strategies
- Overall revenue and expenses

Appendices
- Focus area situation analyses and supporting data
- Action plans, individual pro formas

Match content with audiences

The plan as political artifact
- Executive summary
- Strategic enrollment plan
- Action plans and appendices

Avoid letting data speak for itself

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<th>Model Variable</th>
<th>Risk Category</th>
<th>Risk Threshold</th>
<th>Risk Grade</th>
<th>Actual Persistence</th>
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Evidence from the predictive model highlights the financial difficulties of our students from families in the middle of the financial spectrum. At-risk students come from families with average household incomes of $75,550 to $134,563; generally too high to qualify for need-based aid, but not so high that they can afford to pay as they go. Avoid letting data speak for itself.
Pulling It All Together: The Plan Itself
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Be comprehensive
Make linkages clear

Fiscal Plan
Technology Plan
Facilities Plan
Research Plan
Enrollment Plan
Curricular Plan
Academic Plan
Fundraising Plan

Working session
Task One: Considering the Plan Itself

• Identify the person who should be tabbed as the primary author of the SEP document.
• Identify the primary audiences for the three major segments of the SEP document: the executive summary, the plan itself, and the action plans. For each primary audience, sketch out the predominant issues that will influence their reading of the document.

Considering the final draft
Is it realistic?
Considering the final draft
Sunset current activities

Considering the final draft
Is there funding to support?

Considering the final draft
Has the process been data-informed?
Considering the final draft
Reflective practice and embedded assessment

Systematic assessment
Inform the campus how you responded
Survey your students
Respond to the data with initiatives
Review and share your results

Managing Execution
Introduction to the community

• Determine a roll-out plan
• Understand that priorities will be controversial if you kept the process quiet
• Town-hall concepts
• Faculty and other key leader inclusion

Implementation essentials

• Communicate launch and milestone dates
• Maintain linkages to the institutional strategic plan as appropriate
• Integrate external data; i.e., academic demand trends, into strategies
• Plan for impact on infrastructure and capacity limits
• Keep key constituencies involved and up to date
• Clarify the role of key players; i.e., vice president or dean of enrollment, chief academic officer, chief financial officer, president
• Be realistic about funding implications for the strategies developed
• Link to the budget planning process

Implementation essentials

• Leadership makes a vigilant effort to keep SEP organized and focused
• Define future responsibilities and the role of the SEP council
• Integrate new crises or challenges into the plan
• Be prepared for some enrollment projections not being met as planned; use KPIs to guide and measure efforts and link to effectiveness/outcomes; one struggling plan should not negate the value of the whole
• Be prepared for rising or unexpected costs
• Make the connection with existing academic programs explicit
• Manage leadership transitions
Evaluating and Modifying the Plan

SEP council continues
Monitor milestones, KPIs, and key external trends

Master project and assessment calendars
Assign responsibility and schedule reports
Consider strategic abandonment
What can you stop doing?

Consider strategic abandonment
Or integrate into annual operations?

The never-ending draft
Update annually
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**New Program Development Cycle**

1. Program Review
2. Program Development
3. Program Approval
4. Market Research & Initial Plan
5. Strategic Plan Development

**SEP: Think Cycle**

1. SEP Launch
2. Reset Projections and Goals
3. Develop and Vet Potential Strategies
4. Institutional Strategic Plan Implementation
5. Term-by-Term Assessment and Evaluation
6. Revised Situation Analysis

**Integration with Multiple Plans & Cycles**

- Strategic Enrollment
- Campus Master Plan
- Academic Program Plan
- Institutional Strategic Plan
- Finance & Financial Aid
- Annual Budget
- Annual Marketing
- Annual Academic Policy 

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Working session

Task Two: Planning for the Cycle

- Sketch out the new annual SEP cycle for your institution: when should performance data be collected, and by whom? When should the SEP Council meet annually for performance assessment? For plan refresh activities?
- Identify existing annual planning cycles that strategic enrollment planning will need to sync with for maximum effectiveness at your institution. When do key SEP tasks need to be accomplished to be integrated into those independent annual cycles?

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Q&A

Questions and Discussion
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