



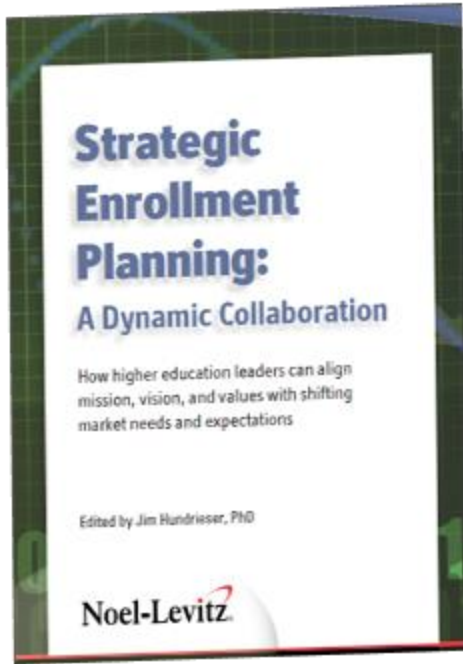
PRESENTATION HANDOUT



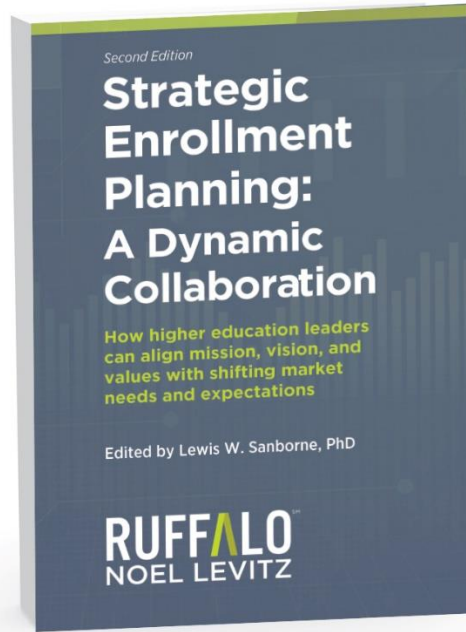
The Fundamentals of Strategic Enrollment Planning

Lew Sanborne, PhD

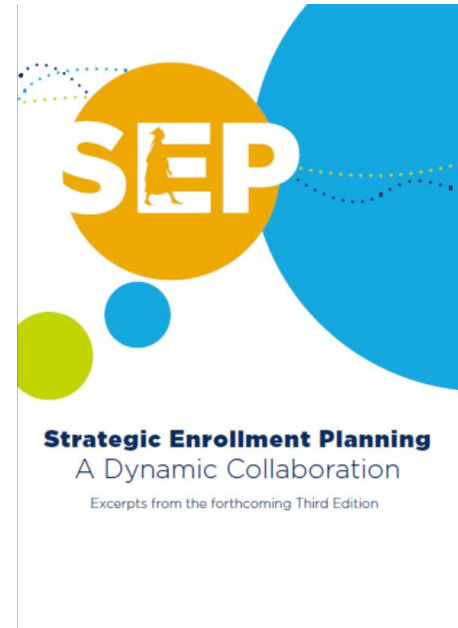
Senior Vice President, Consulting and Research Services



2012



2016



2022

Strategic enrollment planning is a continuous and data-informed process that ...

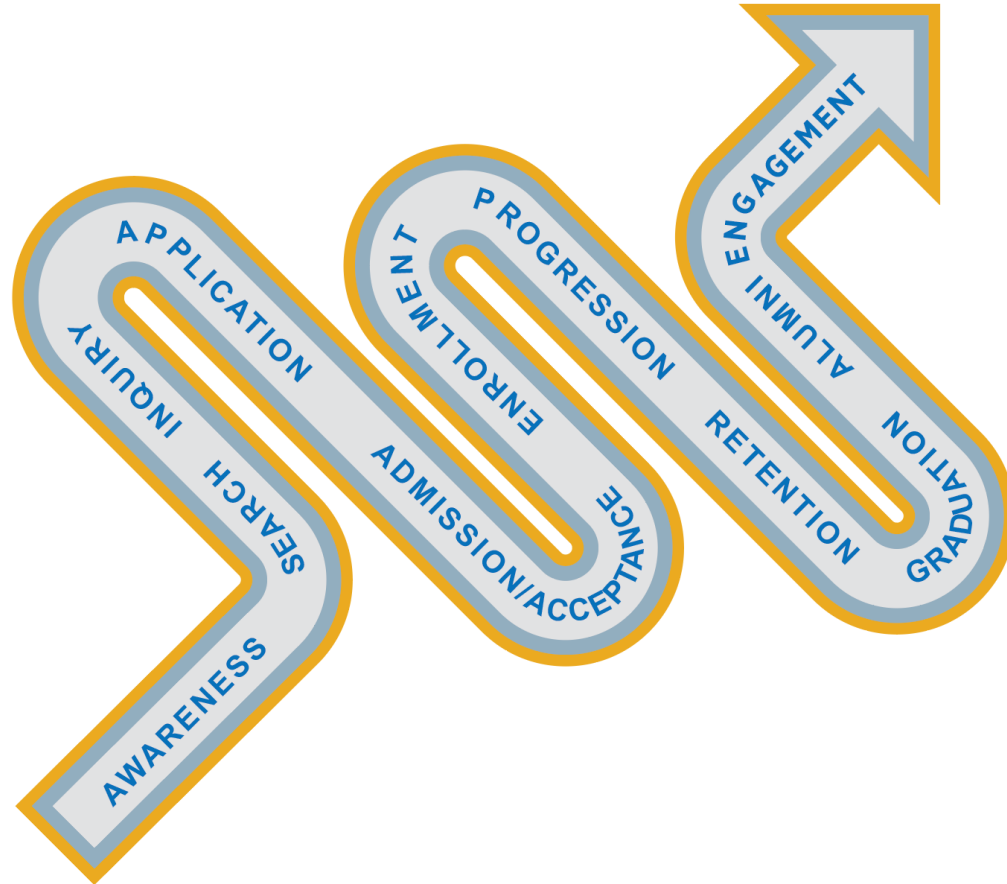
- Provides realistic, quantifiable goals;
- Uses a return-on-investment (ROI) and action item approach; and
- Aligns the institution's mission, current state, and changing environment ...

... to foster planned long-term enrollment and fiscal health.

Session Overview

1. Preparation and Data Analysis
 - Determine Scope
 - Build the organizational structure and getting the right folks involved
 - Craft a data-informed situation analysis
2. Strategy Development
3. Projections, Goal-Setting, Document Creation
4. Implementation: Best Practices and Pitfalls

SEP encompasses the entirety of the student lifecycle. .

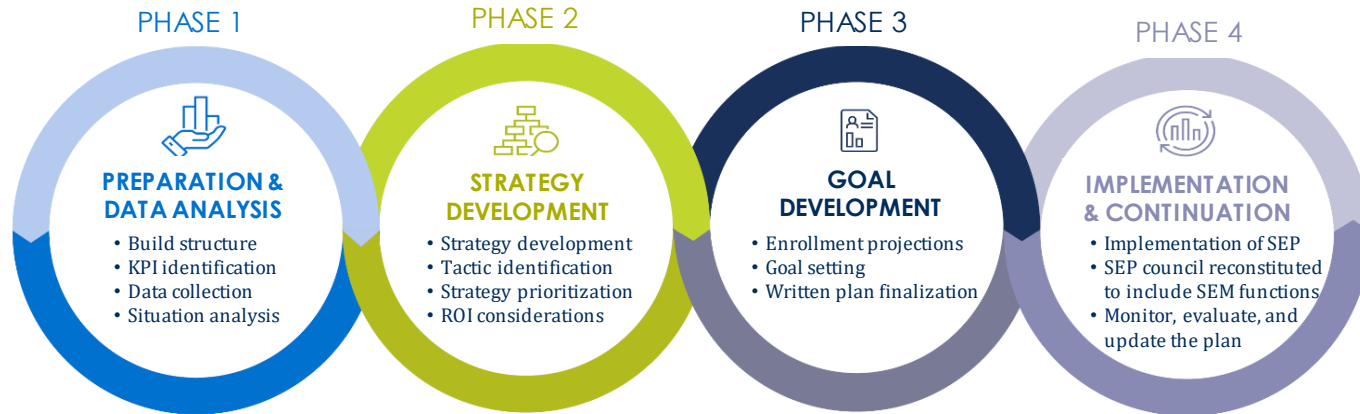


Consider a broad conceptual scope



Strategic Enrollment Planning

The four-phase recursive process





Preparation & Data Analysis

Establish a Temporal Scope

Three-to five-year plan ...

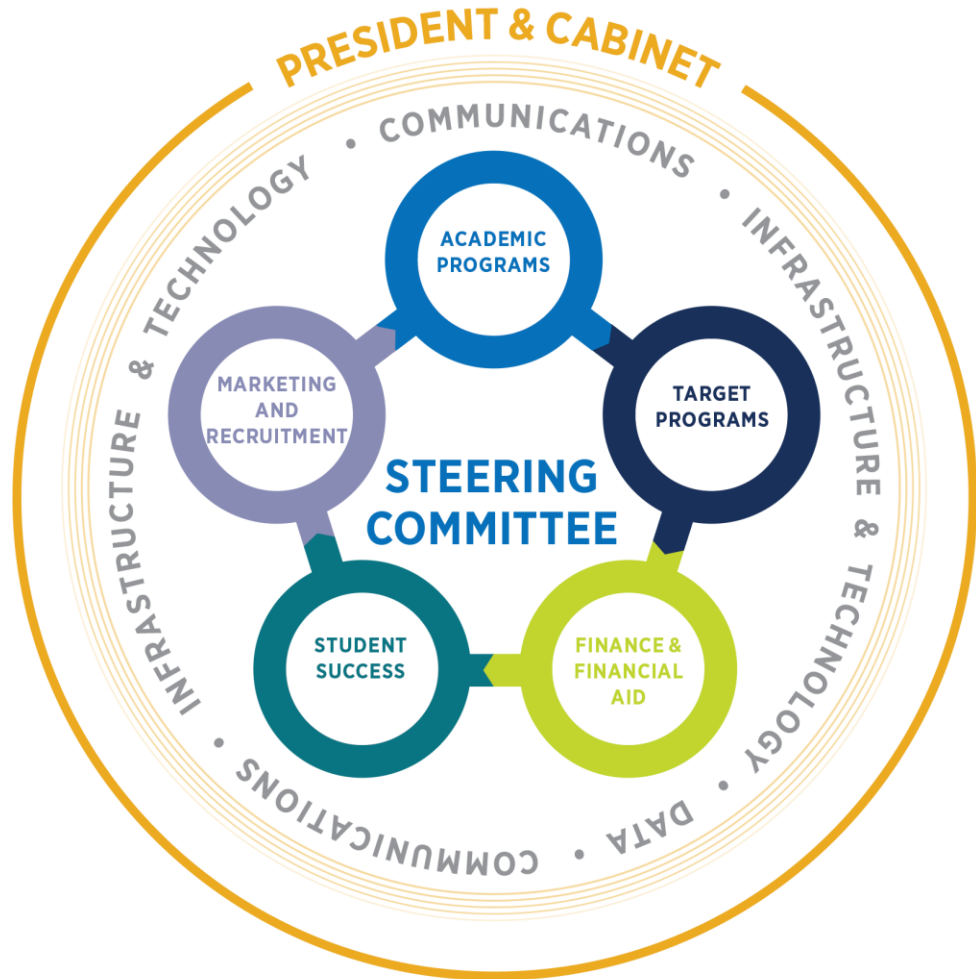
Nine-to-fifteen month process



- Institution wide?
- Undergraduate only?
- Special populations?

Build an Organizational Structure

*Inclusive,
Silo-crossing,
Experience-balanced
(not just STP)*



Involve the right people

- Lead person (or co-lead) who works well with others, has a passion for SEP, and can be the bridge between council and cabinet
- College/University-first thinkers
- Doers
- Early adopters
- Balance of experience and fresh perspectives
- Representation across the structure as a whole to gather buy-in



Establish Key Performance Indicators


Key Performance Indicators

- KPIs are commonly-acknowledged measurements that are **directly related and critical to the mission** and fiscal health of the institution. (Large items such as enrollment or student quality.)

Performance Indicators

- PIs are important measurements that are **indirectly related to the mission** and support key performance indicators. (Specific items such as applicants or ACT/SAT score averages.)

The Interplay Between KPIs and PIs



KPI: Enrollment – Headcount, FTE, off-site enrollment, online enrollment, transfer students, undergraduate/graduate, full- and part-time, geographic origin of students

KPI: Student Quality/Shape – Average ACT/SAT scores (and 25th-75th percentile), average high school GPA, average college GPA, rank in class; diversity characteristics

KPI: Program Quality – CCSSE or NSSE results, student outcomes, capstone course results, placement or licensure exam results, average class size, undergraduate and graduate research, alumni survey data; retention and graduation rates

KPI: Market Position – Program awareness, website traffic, name recognition, market penetration rates, institutional image and perceptions, employer satisfaction

KPI: Fiscal Health – Gross and net operating revenues, auxiliary income, E&G costs by student sub-groups where specialized programs are provided (academic support), net tuition by academic program, co-curricular program, and student segment (academic ability and need)

The Situation Analysis, the foundation for strategy ideation

- Provides assessments of the current and projected strengths, weaknesses, opportunities, and threats that need to be addressed in the development of enrollment strategies
- Tells the story of the Key Performance Indicators
- Provides both historical and comparator contexts
- Is a data-informed narrative based on the best quantitative data that is available, and leverages qualitative data and the views of experienced environmental observers



Strategy Development

Strategy development before goal-setting



Strategies

Where do they come from?

- The research review and situation analysis
- Existing proposals/ideas
- Creative ideation from SEP team members, and from the broader community
- Known limitations in current marketing, recruitment, and student success practices


Honor all input, but sort and prioritize as you go: strategies for further development; tactical just-do-its; ideas too big for SEP; political non-starters (have a parking lot), studies.

Strive for a balance of strategies across these six dimensions. . .



- **Program** (academic, co-curricular, services, support)
- **Place** (on-site, off-site, online, hybrid)
- **Price and Revenue** (tuition, fees, discounts, incentives)
- **Promotion** (marketing, recruitment, web presence)
- **Purpose and Identity** (mission, distinctiveness, brand)
- **Process** (data-informed, integrated planning)

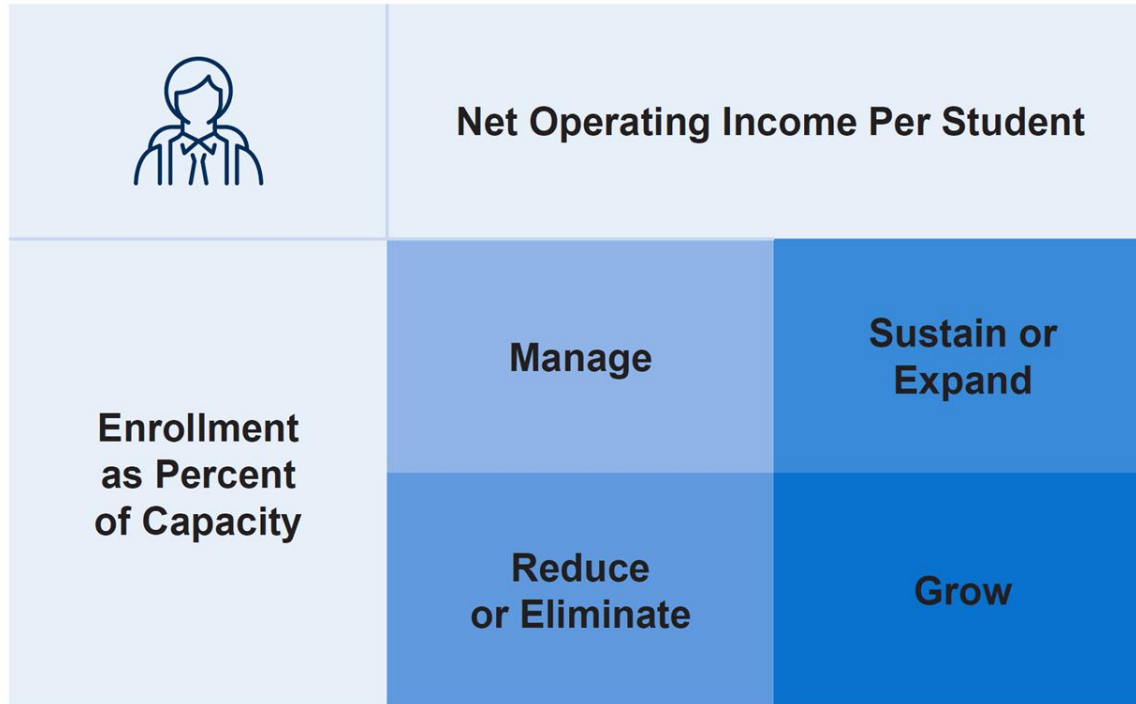
. . . and balance across the Ansoff growth strategy matrix

	Existing Programs/Services	New Programs/Services
Existing Markets	Market Penetration	Program Development
New Markets	Market Development	Diversification

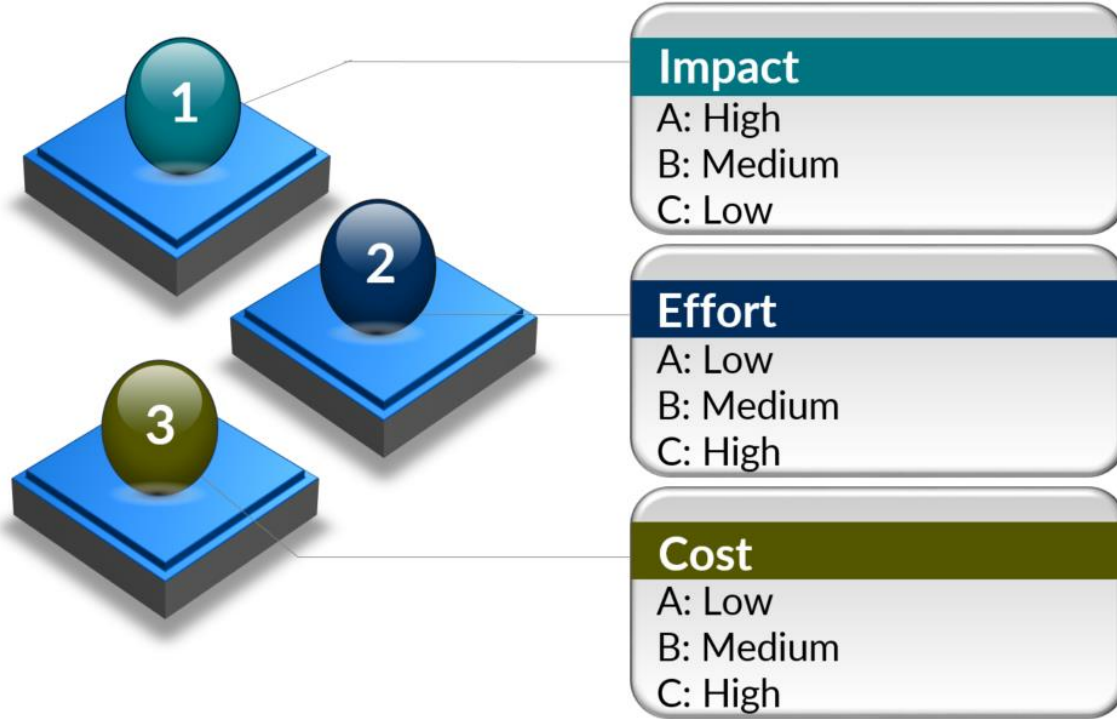
**In program
development,
strive for the
sweet spot**



For academic and co-curricular programs, know which programs are in which quadrant



Pre-prioritize strategies





From Strategy Concept to Action Plan

Plan #:

Action Plan Title:

KPI(s):

Overarching Strategy:

Further Description/Explanation:

Implementation Schedule/Timetable

Steps	Responsibility	Cost	Start Date	Completion Date

Rationale for Estimated Enrollment Impact:

Coordinator:

Evaluation/Assessment:



Be sure all teams are using a uniform approach to estimating multi-year impact

Baseline for target population:						
Traditional Undergraduate Students/Years	projected	projected	projected	projected	projected	projected
	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Incremental New						
Additional 2nd Yrs.		0	0	0	0	0
Additional 3rd Yrs.			0	0	0	0
Additional 4th Yrs.				0	0	0
Additional 5th Yrs.					0	0
Incremental Retained						
Retained to third year		0	0	0	0	0
Retained to fourth year			0	0	0	0
Retained to fifth year				0	0	0
Total Impact	0	0	0	0	0	0
Retention Assumptions						
Second Year Rate	76.6%					
Third Year Rate	63.3%					
Fourth Year Rate	57.0%					
Fifth Year Rate	18.8%					

Build pro forma budgets

Revenue & Expenses							
Plan #:	Note: Most Expenses (as noted) will auto-populate from the Budget Detail tab.						
Action Plan/Strategy Title:	Projected	Projected	Projected	Projected	Projected	Projected	Projected
	<u>2022-23</u>	<u>2023-24</u>	<u>2024-25</u>	<u>2025-26</u>	<u>2026-27</u>	<u>2027-28</u>	<u>2028-29</u>
REVENUE:							
Expected Number of Total Incremental FTIC Students:		0	0	0	0	0	0
Average Net Revenue per FTIC Student:							
Expected Number of Total Incremental Transfer Students:		0	0	0	0	0	0
Average Net Revenue per Transfer Student:							
Expected Number of Total Incremental Grad Students:		0	0	0	0	0	0
Average Net Revenue per Grad Student:							
Re-directed Resources (will auto-populate):	0	0	0	0	0	0	0
Total Revenue		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
OPERATING EXPENSE:							
Salaries (will auto-populate from the previous tab):	\$ -	\$0	\$0	\$0	\$0	\$0	\$0
Benefits @ 35%	\$ -	\$0	\$0	\$0	\$0	\$0	\$0
Adjunct Faculty/Part Time Staff (will auto-populate)	\$ -	\$0	\$0	\$0	\$0	\$0	\$0
Financial Aid*:							
Office Expense(will auto-populate):	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel/Conferences/Conventions (will auto-populate)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Marketing/Communications (will auto-populate):	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Hospitality Expenses(will auto-populate):	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Miscellaneous (will auto-populate):	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Operating Expense:	\$ -	\$0	\$0	\$0	\$0	\$0	\$0
CAPITAL EXPENSE:							
Equipment & Technology (will auto-populate):	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other (will auto-populate):	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Capital Expense:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expense:	\$ -	\$0	\$0	\$0	\$0	\$0	\$0
Net Income (loss):	\$ -	\$0	\$0	\$0	\$0	\$0	\$0
Cumulative Net Revenue (loss)	\$ -	\$ -	\$0	\$0	\$0	\$0	\$0
Net Income per incremental student:		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
* In addition to average entering student financial aid							





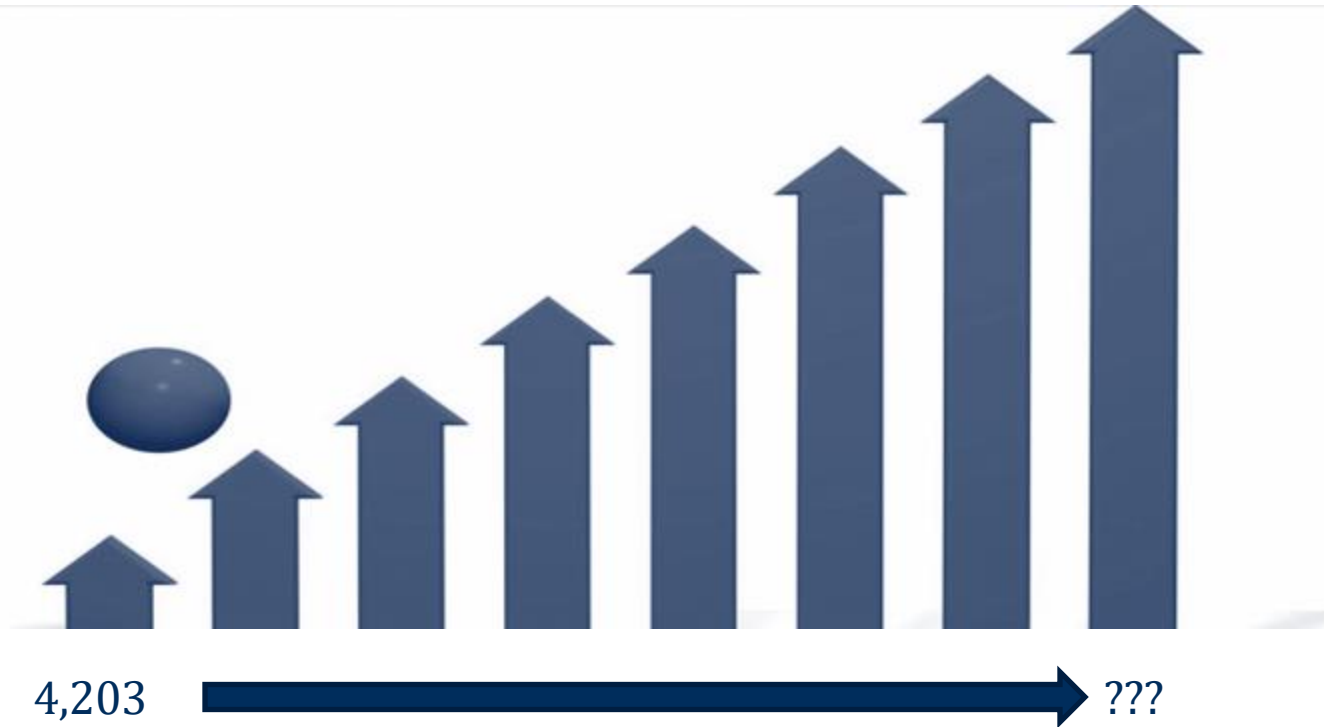
Projections,
Goal-Setting,
Document
Creation



Goal-Setting Steps

1. Establish a baseline enrollment and revenue forecast
2. Aggregate the projected enrollment and fiscal impact of the selected strategies by year
3. Factor in a failure rate (typically 15%-20%)
4. Develop a funding strategy
5. Finalize multi-year enrollment and net revenue goals

Then enrollment and net revenue impact of each strategy is added to the baseline forecast



Write the Plan!

Introduction and Executive Summary
Organizational Structure for Planning and Foci
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



Implementation & Pitfalls



Leadership and Organization

- A doer leading doers
- Credibility with faculty
- Attention to deadlines and milestone completion
- Broad inclusion, but not a slavish approach to representation
- Effective delegation

Data Orientation: Planning through Assessment

- Credible trend data, internal and external
- Commitment to becoming data-informed
- Agreement on KPIs
- Realistic budgets; conservative enrollment projections (informed by real environmental trend data)
- Assessment and evaluation metrics baked in



Communication & Buy-In

- Regular campus updates
- Transparency
- Broad participation
- Opportunities for input
- Honest and regular outcomes reporting



Realistic Funding

- Real dollars for investment
- Appropriately resourced plans
- Short-term wins balanced with long-term commitment
- A philosophy of re-investment
- Sunset considerations

Q & A

Thanks for engaging!

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