



SEM Core Concepts Enrollment Workshop

Strategic Enrollment Management Planning

University of Connecticut

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AMERICAN ASSOCIATION of
COLLEGIATE REGISTRARS and ADMISSIONS OFFICERS

Jody Gordon and Stanley E. Henderson



SEM CORE CONCEPTS

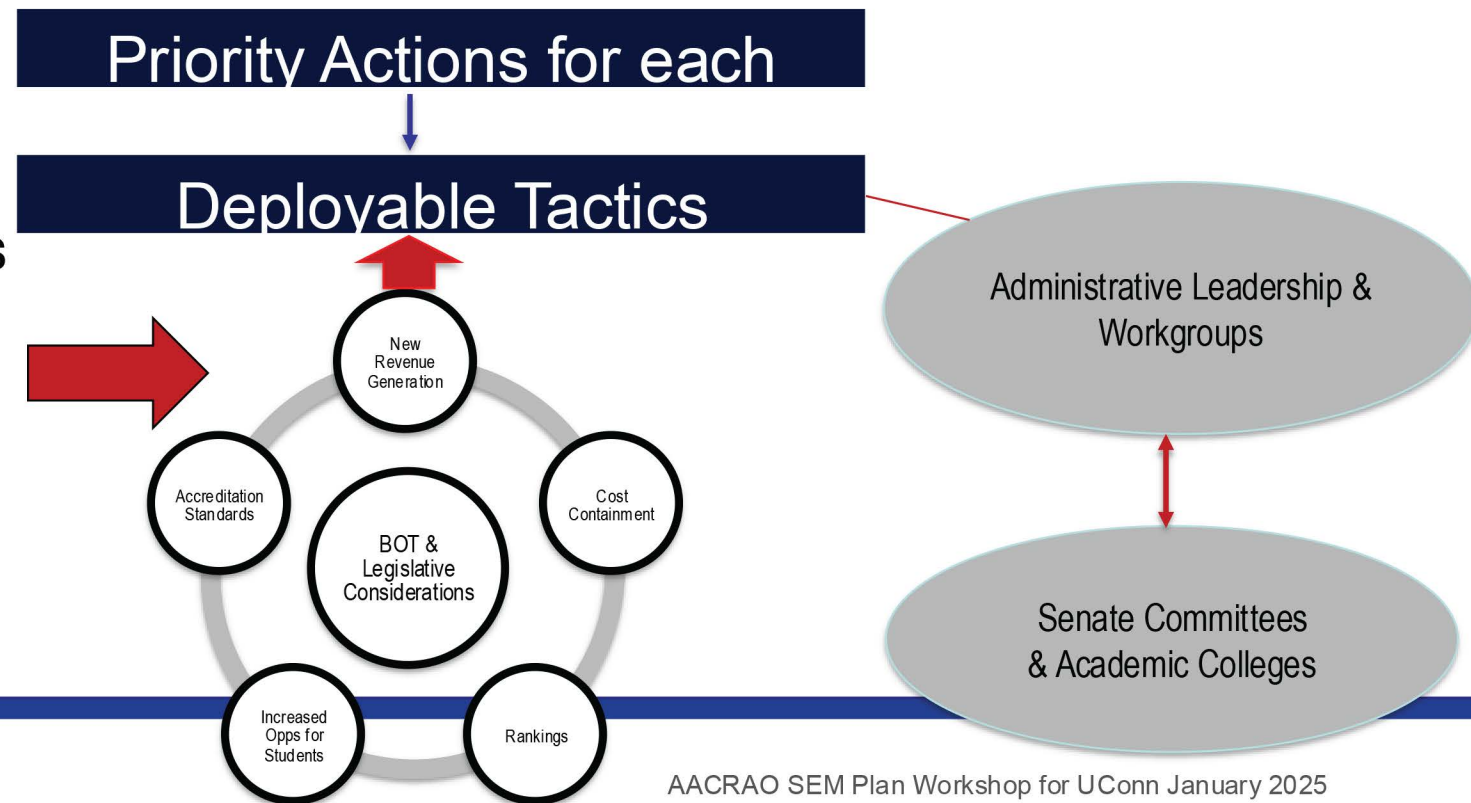
Leading Toward Learner Success and Campus Enrollment Health

SEM Planning

SEM: AN ENTERPRISE RESPONSE



SEM is how we operationalize our Strategic Goals and Areas of Focus through the lens of enrollment and learner success guided by these considerations and deployable Tactics



SHARED GOVERNANCE & SEM PLANNING

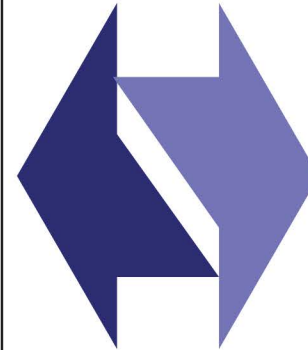
University Senate

University Bylaws, Article IX: “There shall be a University Senate that shall be a legislative body for the purpose of establishing minimum rules and general regulations the educational program and mission of the institution... The University Senate shall be regularly consulted by the Administration on matters pertaining to the Senate’s purview.”

Senate Executive Committee

Senate Committees

Curricula & Courses	Nominating
Common Curriculum	Scholastic Standards
Enrollment	Student Welfare
Faculty Standards	University Budget
Justice, Equity, Diversity, Inclusion	University Planning

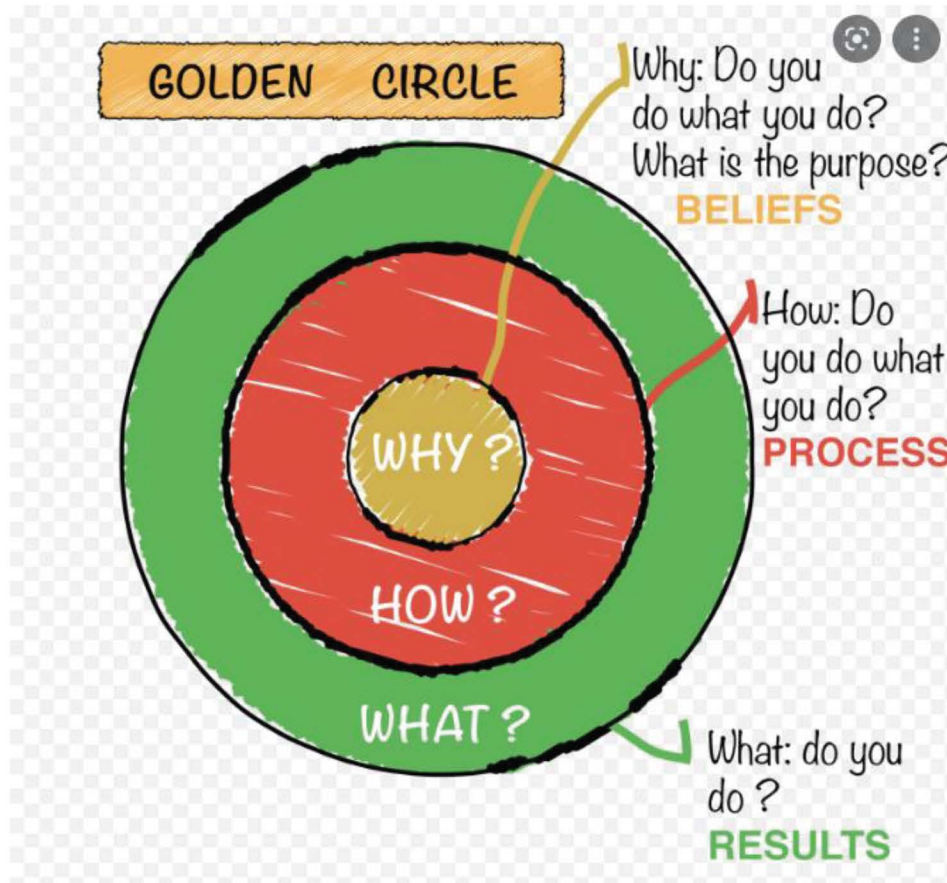


University Strategic Plan

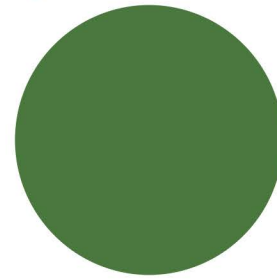


SEM Planning
Goals
Strategies
Tactics

What type of university do we aspire to be?



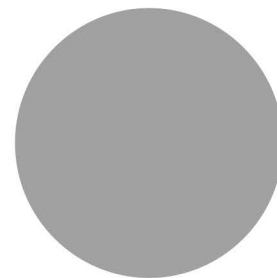
Start with Why By Simon Sinek



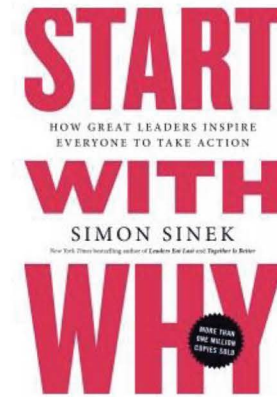
Institutional Size – How big will the university be in 5 years? Regional campuses?

Enrollment Mix – What is our desired on-line vs. in-seat enrollment? Credit vs. workforce training enrollment? What should our programmatic makeup look like?

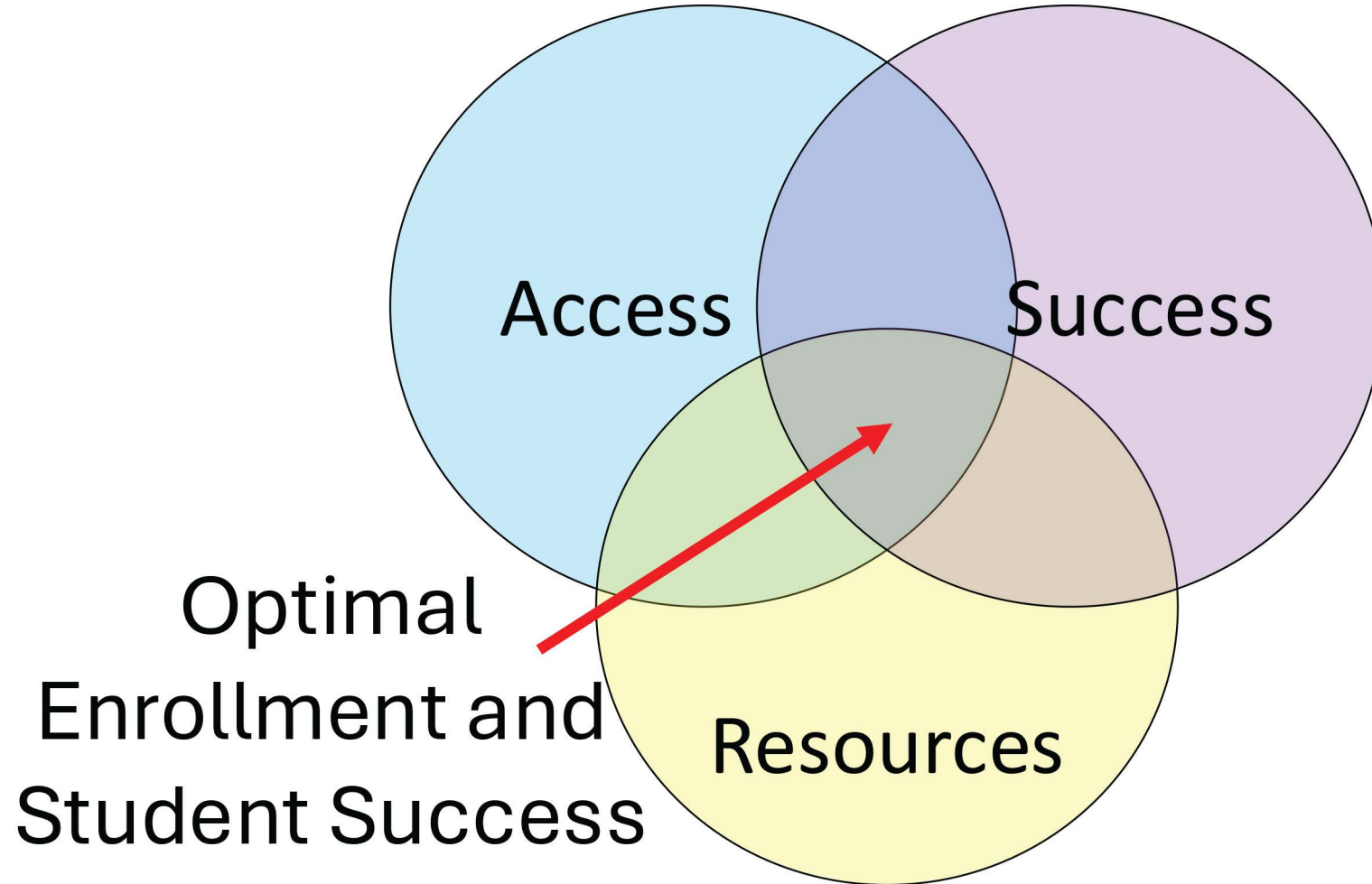
Learner Experience – What experience do we desire for our students? What should be optional vs. mandatory?



Justice, Equity, Diversity, Inclusion, Belonging – How will our enrollment mix and our student experience address equity gaps in access, persistence and completion? How will we improve diversity, inclusion and belonging?



“Competing” Enrollment Goals



SEM: AN ENTERPRISE RESPONSE

*“Strategic enrollment management (SEM) is a **concept and process** that enables the fulfillment of institutional mission and students’ educational goals.” ~ Bob Bontrager (2004)*

Strategic Enrollment Management is a comprehensive process designed to help an institution achieve and maintain the optimum recruitment, retention, and graduation rates of students, where “optimum” is defined within the academic context of the institution. As such, SEM is an institution-wide process that embraces virtually every aspect of an institution’s function and culture. ~ Michael Dolence

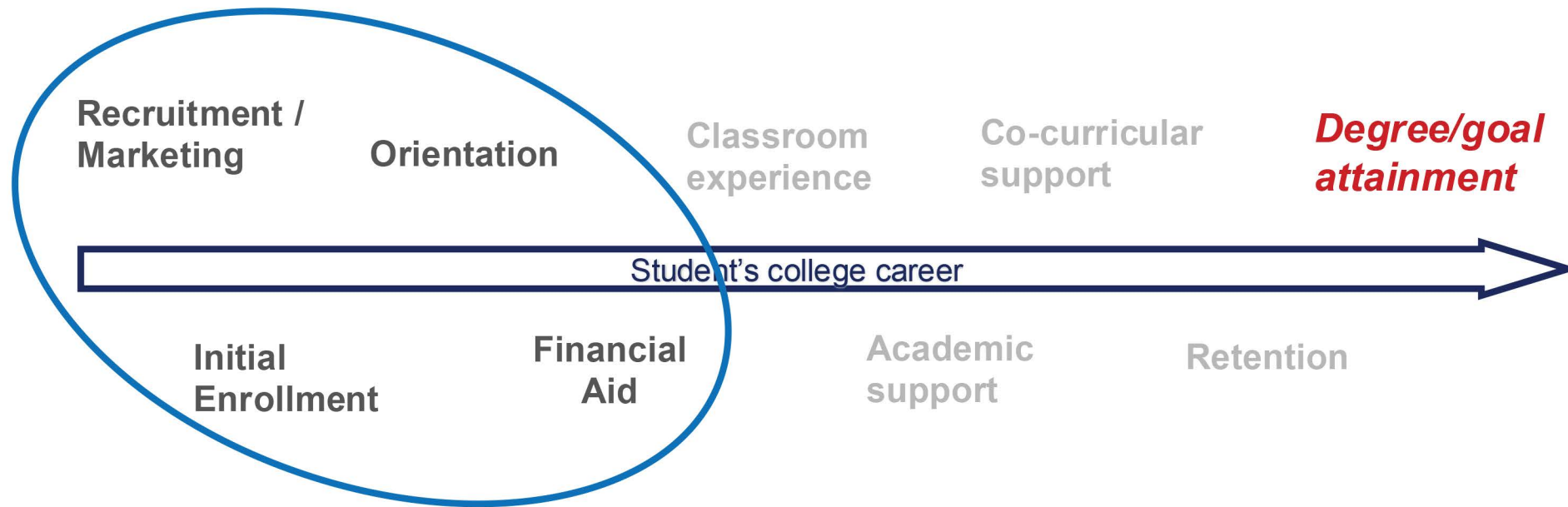
*Enrollment management is a comprehensive and coordinated process that enables a college to identify enrollment goals that are allied with its mission, its strategic plan, its environment, and its resources, and to reach those goals through the **effective integration of administrative processes, student services, curriculum planning, and market analysis.***

~ Christine Kerlin

SEM is NOT . . .

1. A quick fix
2. The work of a single administrative unit
3. Solely about recruitment and marketing
4. Grounded in anecdotal evidence
5. Disconnected from your strategic plan

In other words... Not the Traditional Enrollment Perspective



Bontrager, 2004

SEM is Holistic

STUDENT LEARNING JOURNEY

- Dual enrollment
- Secondary preparation pipeline
- Articulation and partnerships

INQUIRY/ PROSPECT/ NEW STUDENT

RECRUITMENT/
MARKETING

ORIENTATION

ADMISSION/INITIAL
ENROLLMENT

FINANCIAL AID

CONTINUING STUDENT

LEARNING – ON
CAMPUS AND
VIRTUAL

LEARNER SUPPORT

CO-CURRICULAR
LEARNING AND
SUPPORT

COMPLETION/GRADUATE AND ALUM

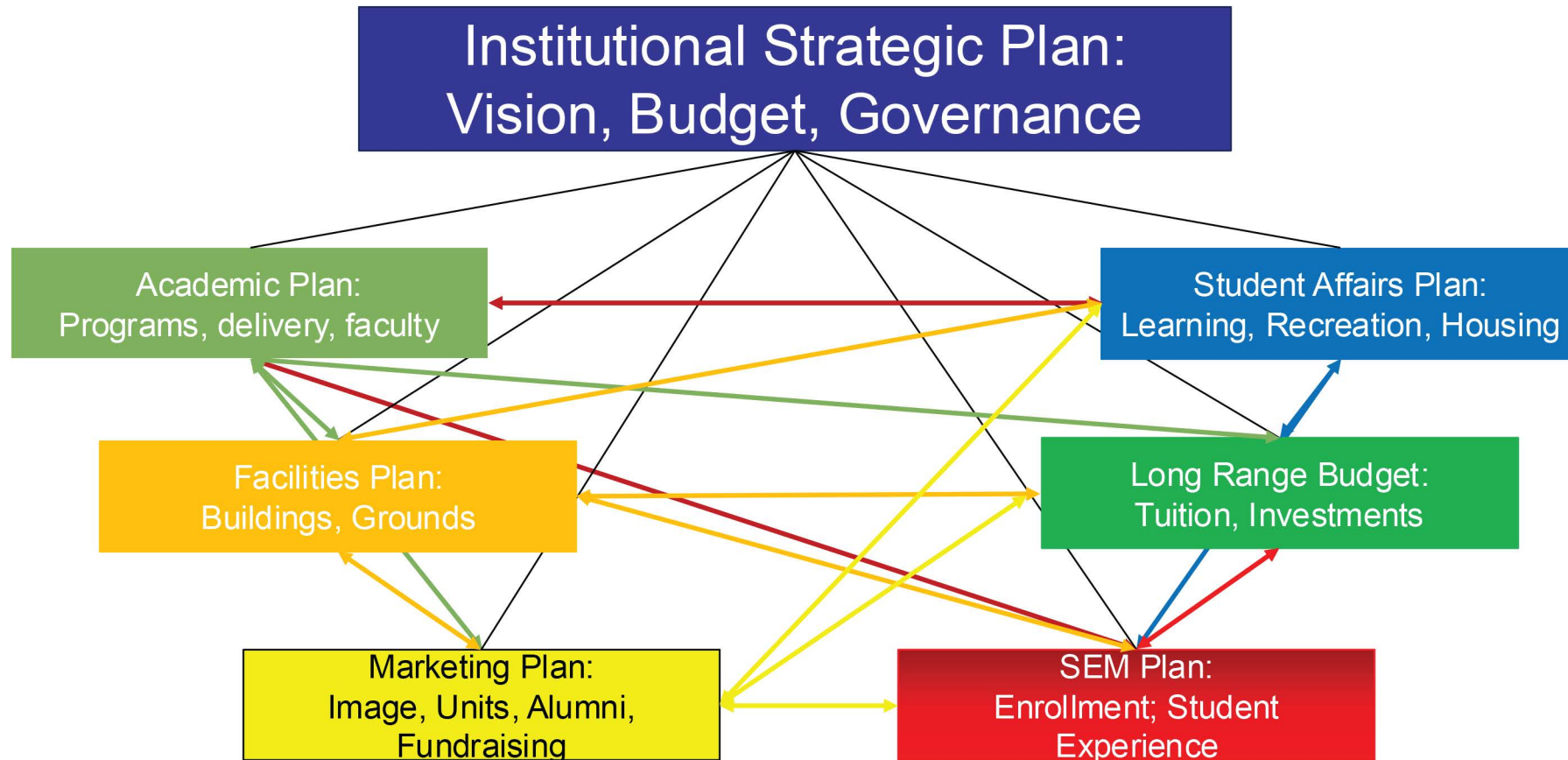
GOAL/CREDENTIAL
ATTAINMENT

PERSISTENCE

- Satisfied, engaged alumni
- Increased job/career satisfaction and outcomes
- Increased equity

Adapted from Bontrager, 2004
by Gordon and Wankel, 2023

SEM as a Linked Strategic Plan



LinkEx

SEM AS AN ADD-IN NOT AN ADD-ON

LINK



INTEGRATE

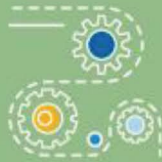


EXTEND



LOOK FOR LINKS

- Review the good work of your initiatives (former/continuing & new/adhoc).
- Use this data to identify strategies that effect enrollment in critical ways.



INTEGRATE

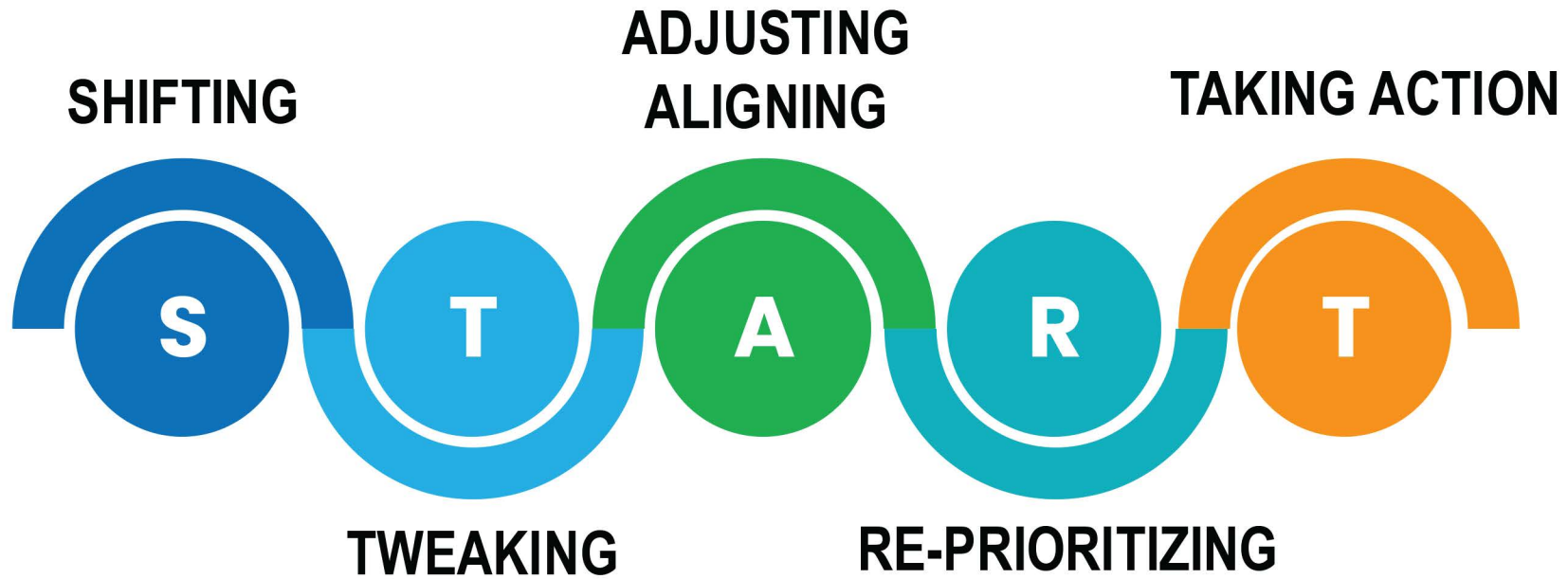
- Assess the expected impact of those strategies.
- When they are linked and integrated, outline their expected cumulative effect.



EXTEND

- Analyze how those strategies move the needle toward enrollment goals.
- Identify gaps for possible additional strategies (or better linkages).
- Extend your plans toward the broad picture of your enrollment future.

An ITERATIVE Process Right from the...



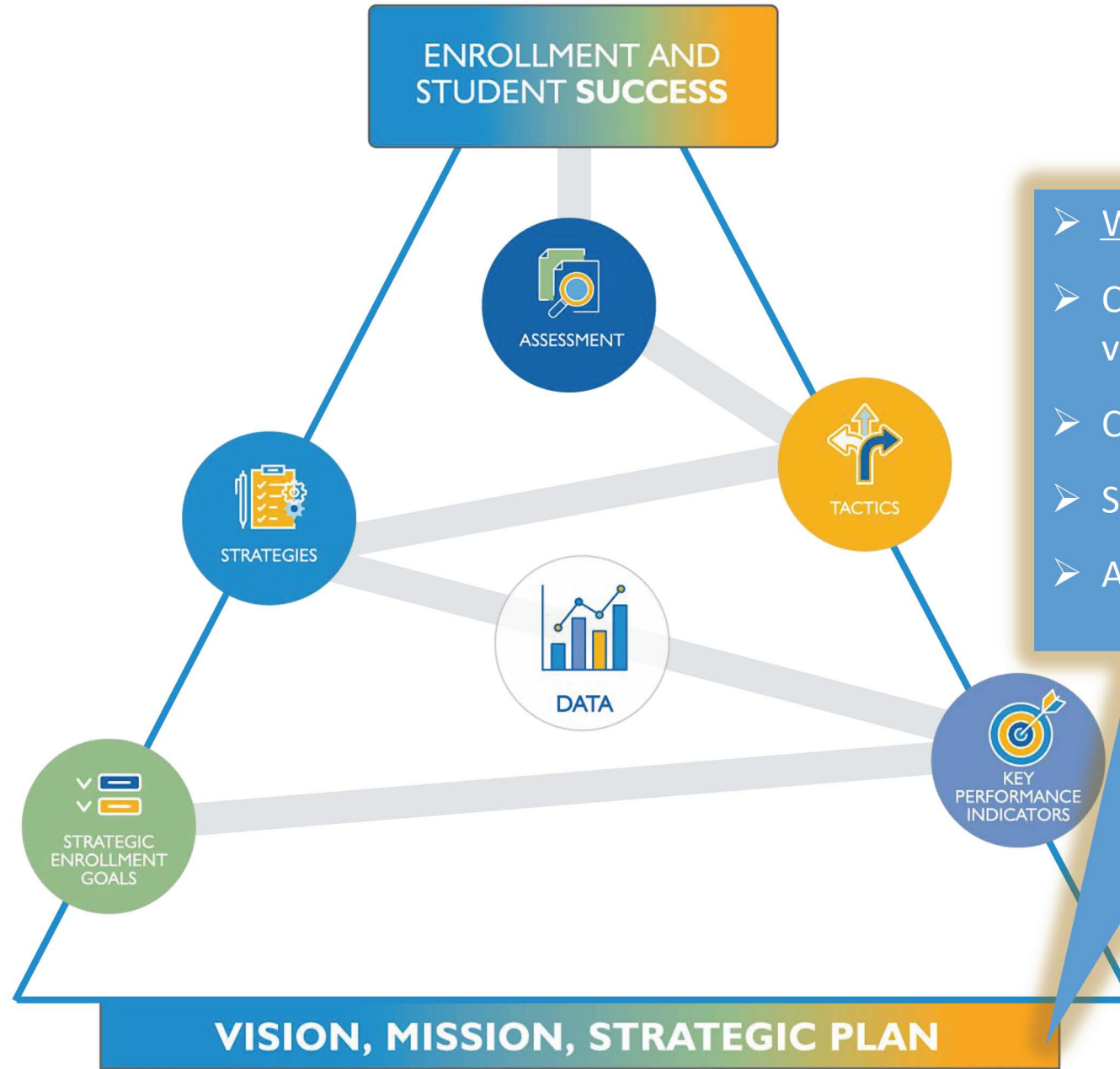
The Purposes of SEM are Achieved by...

1. Establishing **clear goals** for the number and types of students needed to fulfill the institutional mission
2. Promoting **learners' academic success** by improving access, transition, persistence, and graduation
3. Promoting institutional success by enabling effective **strategic and financial planning**
4. Creating a **data-rich environment** to inform decisions and evaluate strategies
5. Improving process, organizational and financial **efficiency** and outcomes
6. Strengthening **communications and marketing** with internal and external stakeholders
7. Increasing **collaboration and engagement** among departments across the campus to support the enrollment efforts and learner success
8. Ensuring other planning initiatives are **linked, integrated and extended** to the SEM plan

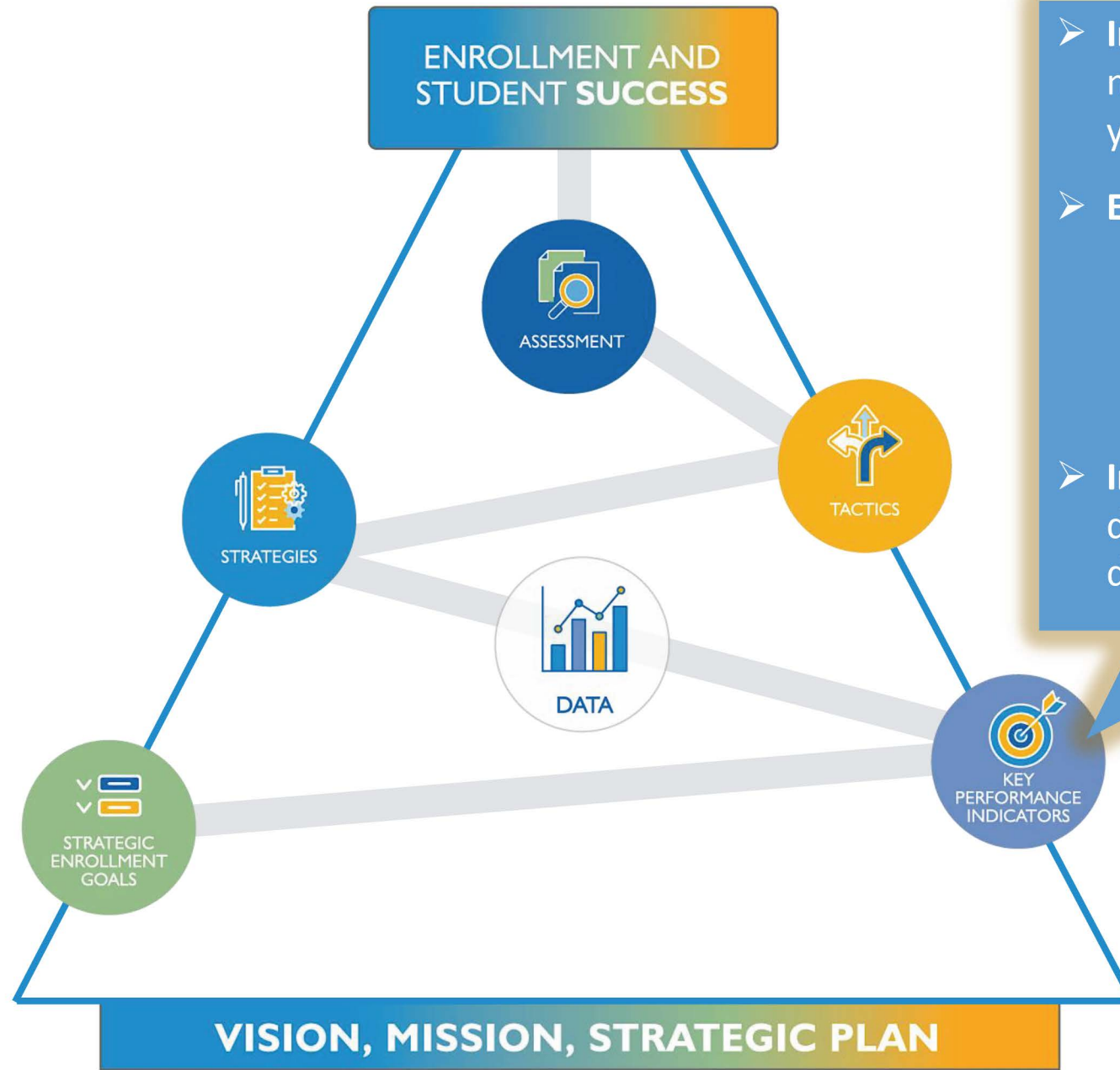
Adapted from Bontrager, 2004

Building Your SEM Plan





- WHY we do what we do
- Clarity of institutional mission, vision, goals
- Core competencies
- Strategic direction
- Aggregate enrollment goals



- **Internal benchmarks:** KEI numbers over the past 3-5 years
- **Environmental scan**
 - Demographics
 - Economics
 - Market opportunities
 - Competition
- **Institutional research plan:** designated reports and other data that was collected



- **Student types:** first year, transfer, dual enrollment, in-seat, workforce training, continuing ed, face-to-face/online, certificate, diploma, etc.
- **Mix of students or Desired student groups:** racial/ethnic diversity, academic ability, 1st gen; adult learners
- **Geographic origin:** local, regional, national
- **Success Metrics:** inquiries, applications, admits, enrolled, yield percentage, retention/persistence/completion rates
- **Student satisfaction rates**

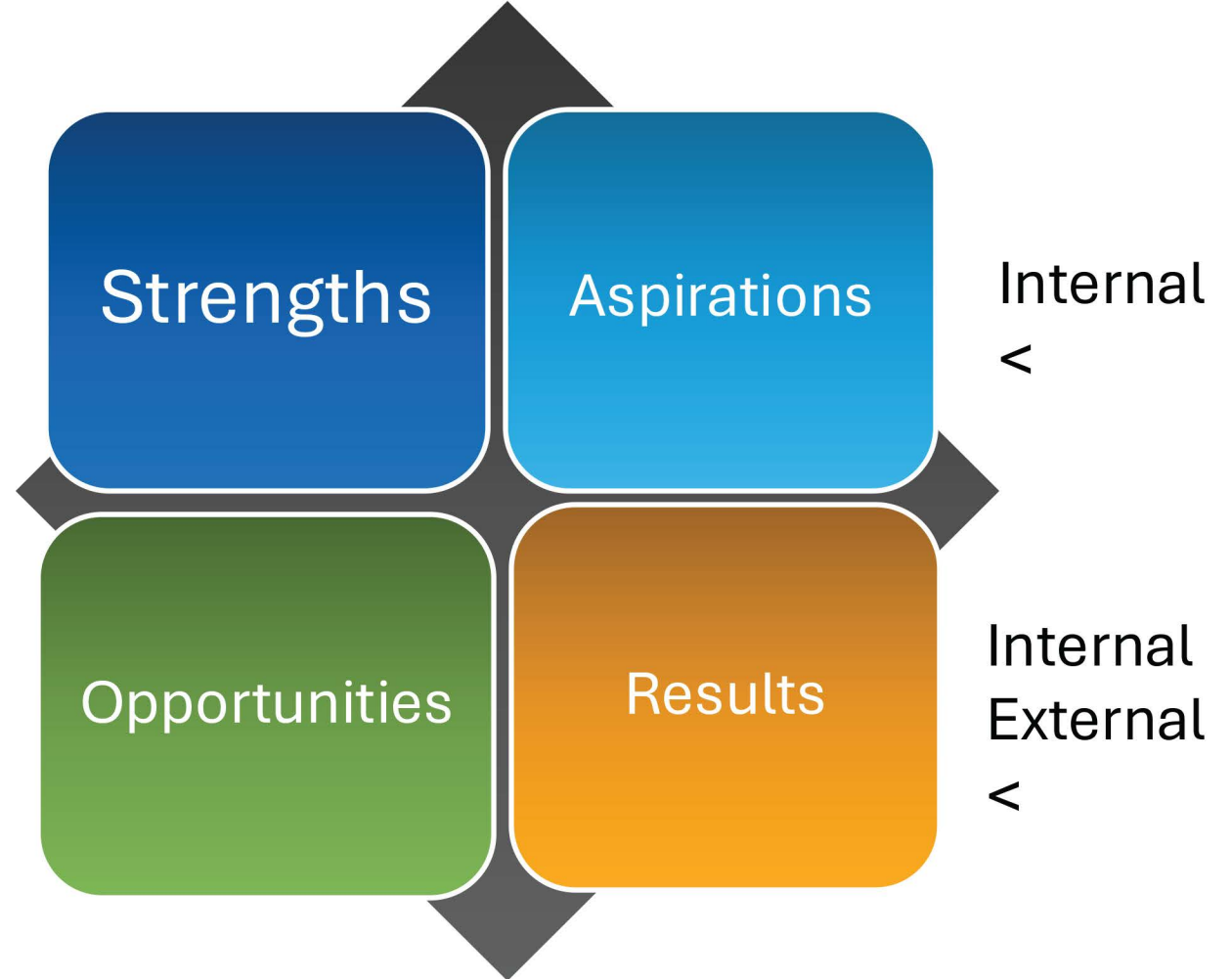
Let's Gather your Feedback

Take a closer look at how we might use the data:

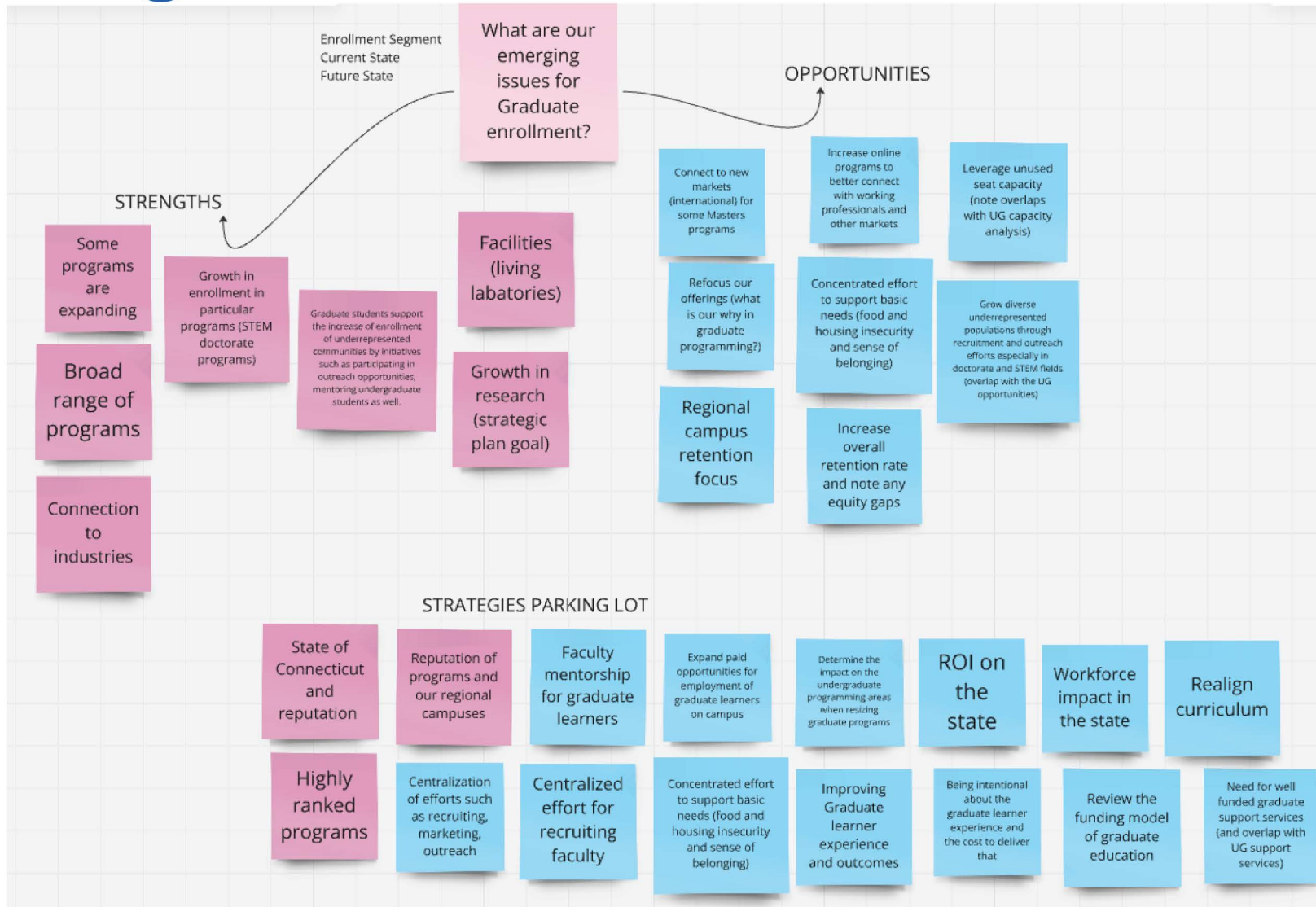
Internal
>

SOAR, an Internal/External Matrix

Internal
External
>



Steering Committee's Feedback on Graduate



Steering Committee's Feedback on Undergraduate



After the SOAR...



- What stories are emerging that are supported by data and the SOAR at this point?
- Stories help test the data.
- Stories help you understand the data that you have been studying.

Forming issues

- An **issue** is a statement of **“fact”** that demands your attention and response.
- The issue is derived from the stories you are seeing in your qualitative and quantitative data and SOAR.
- The issue statement begs the **key question**: “What are we going to do about it?”
- The issue may be a challenge, or it might be an opportunity.
- Clarifying your issues enables you to see what you really need to respond to...and to “make the case.”
- This strengthens your ability to **prioritize**...and it becomes your rallying cry.

From Environmental Scanning to Goal Development

Analyze Strengths, Opportunities, Aspirations and Results (SOAR)

↳ Tell the stories that the data/SOAR represents

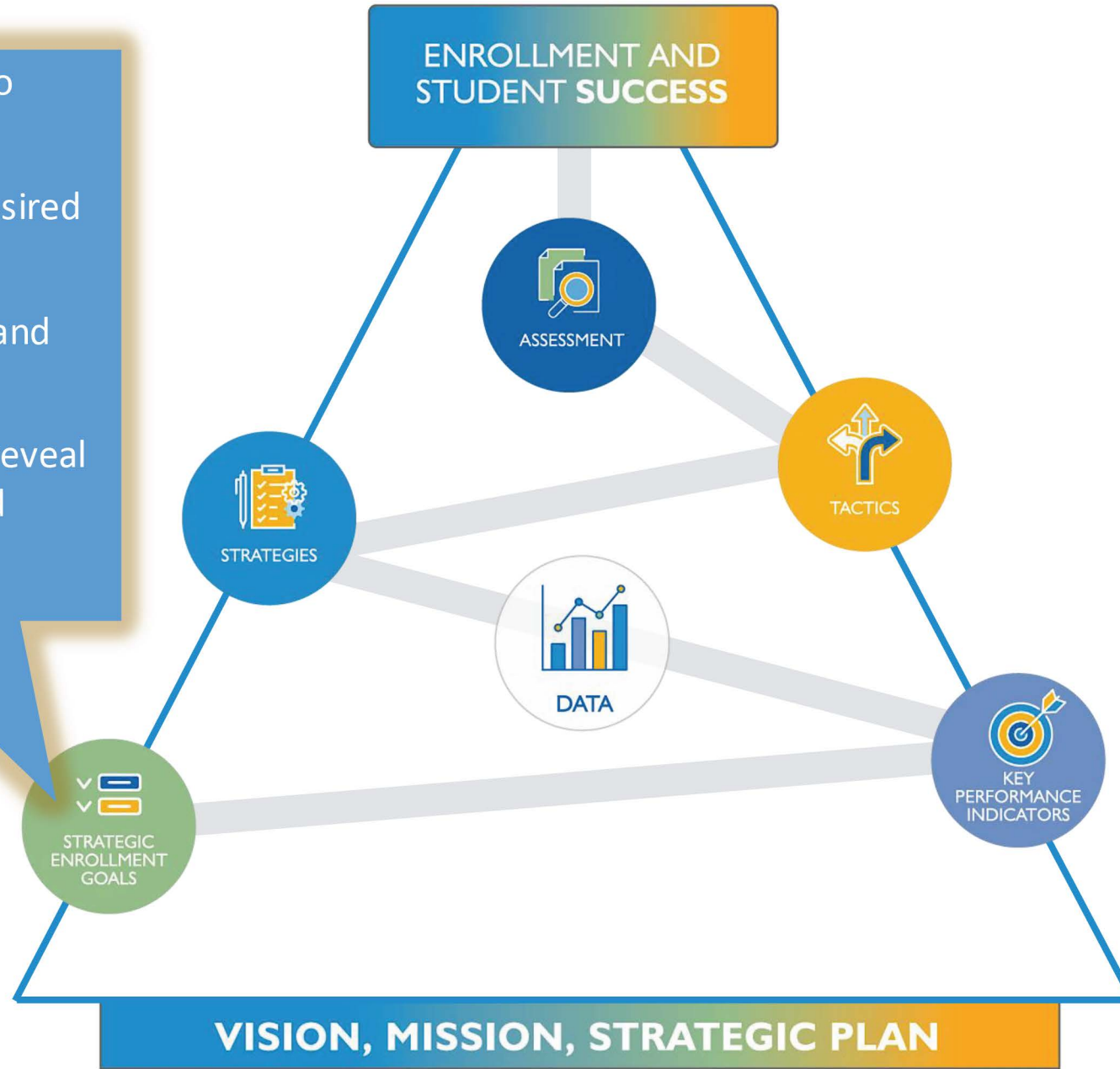
↳ Identify the issues the data/SOAR reveals

↳ Select the more pressing, or most impactful, issues...prioritize!

↳ Describe the **goals** that can or should be achieved by addressing those priorities

↳ Respond to those priorities Action plans (strategies and tactics) and measure the results/outcomes

- A reflection of WHY we do what we do
- **Focus:** the institution's desired future
- **Based on:** mission, data, and environmental scanning
- What issues do our data reveal about our enrollment and student experience?





What are Enrollment and Learner Success Goals?

1. The concise statements about where you are today and how far you want that to change at a fixed point in the future, but without a roadmap as to how to do it
2. Goals name the **enrollment segment** that will move and the experience we want them to have:
 - First year full time, transfers, dual enrollment, adult learners, etc.
3. Goals state the **starting point**
 - “from 686 degree-seeking first year full time in the fall 2020 term”
4. Goals state the desired **ending point**
 - “to 1000 degree-seeking first year full time in the fall 2026 term”

- Sets the direction for HOW the goals will be met
- Bold ideas
- Integration with existing initiatives
- Utilize emerging technologies
- Financial aid/scholarships
- Academic programs: mix and delivery systems
- **Staffing**: skill sets, strategic deployment
- **Capacity for making effective enrollment decisions** : positions, reporting lines, committees





- HOW the strategies will be met to then meet our goals
- Specific steps and actions that must be taken to achieve the strategies
- CRM to improve communication
- Degree Audit
- Automating workflows
- Redesigned website
- Curriculum management software
- Supplemental instruction
- Academic alert



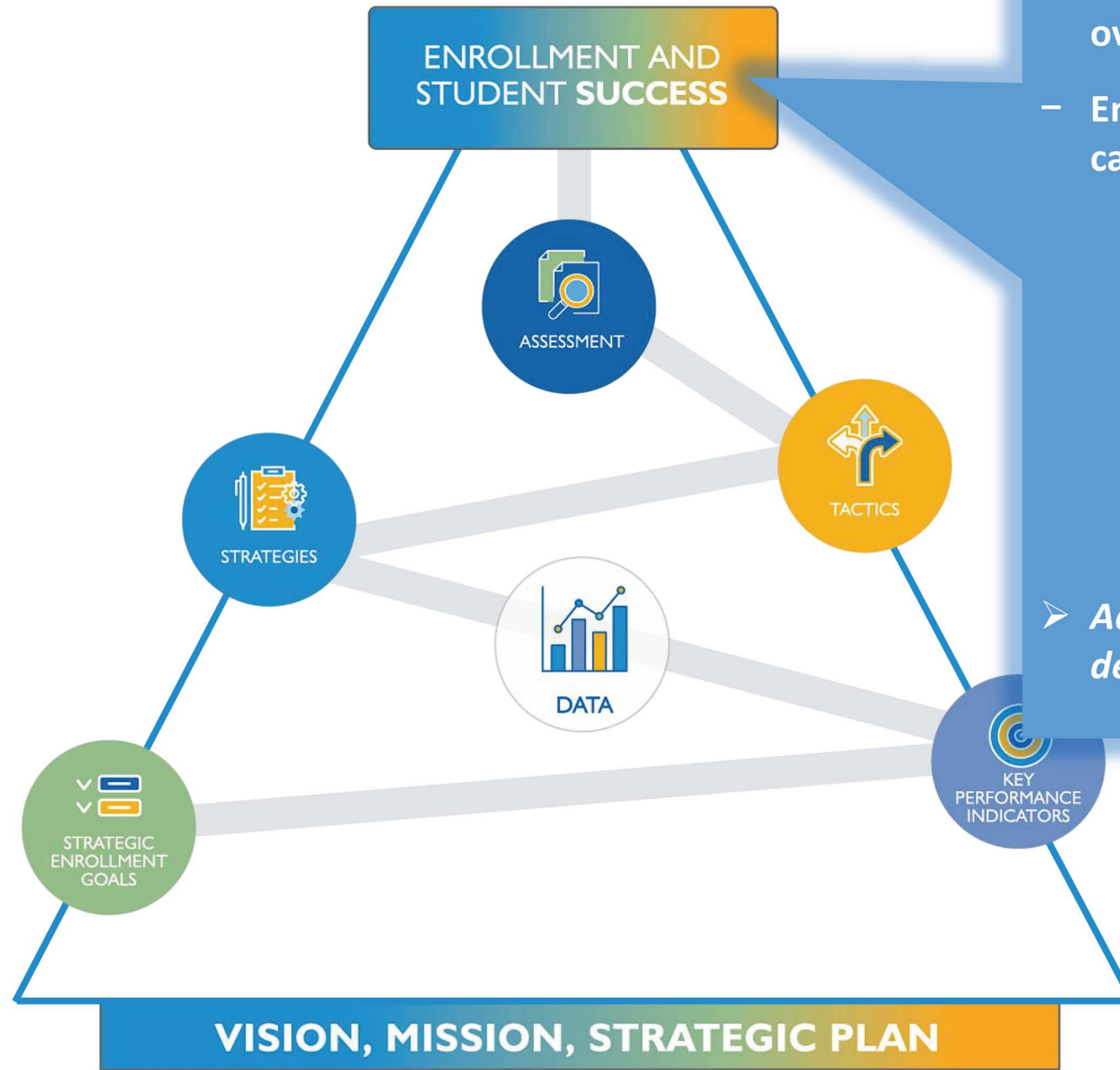
Enrollment and Learner Success Goals Summarized

- Mission, Vision, Values, Strategic Plan: the foundation stones of SEM
- **Goals**: 6-8 broad statements that will frame data-informed **issues** to drive change in your enrollment and learner success and allow you to meet the vision and strategic plan of the college.
- **Strategies**: 3-4 more focused, but still relatively broad, statements for each goal to identify a **direction** that will support that goal.
- **Tactics** and action plans: 3-4 specific tactical statements for each strategy with supporting steps, timelines, personnel, and metrics to operationalize that strategy--the road map for **how to achieve** each strategy and support the goals.



- The WHAT – RESULTS
- Accountability
- Measurements of success
- Timelines, milestones

- **Internal benchmarks:** KEI numbers over the past 3-5 years
- **Environmental scan**
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➤ Consistently meeting goals over the long term

– Enabling more effective campus-wide planning

- Revisions to the institutional strategic plan
- Academic planning: curriculum, faculty needs
- Facility planning
- Financial planning
- Student affairs planning

➤ *Achieving the institution's desired future*



SEM is Iterative

MAINTAIN ALIGNMENT WITH INSTITUTIONAL STRATEGIC PLAN
with broad enrollment targets, desired mix of students and overall student experience.

DATA AND INFORMATION GATHERING AND ASSESSMENT:
Internal culture/environment, student enrollment behaviors and scan of external environment.

Use data and information results to **MAINTAIN FOCUSED GOALS** each for recruitment, retention, service, etc., and enrollment projection models.

ASSESS AND ADJUST TARGETS and enrollment projection models for strategic goals.

Develop, assess, and adjust **ACTION STEPS (TACTICS), ACCOUNTABILITY, AND METRICS.**

IMPLEMENT action steps (tactics).

MONITOR AND ASSESS PROGRESS:
Report results to campus and executive leadership.

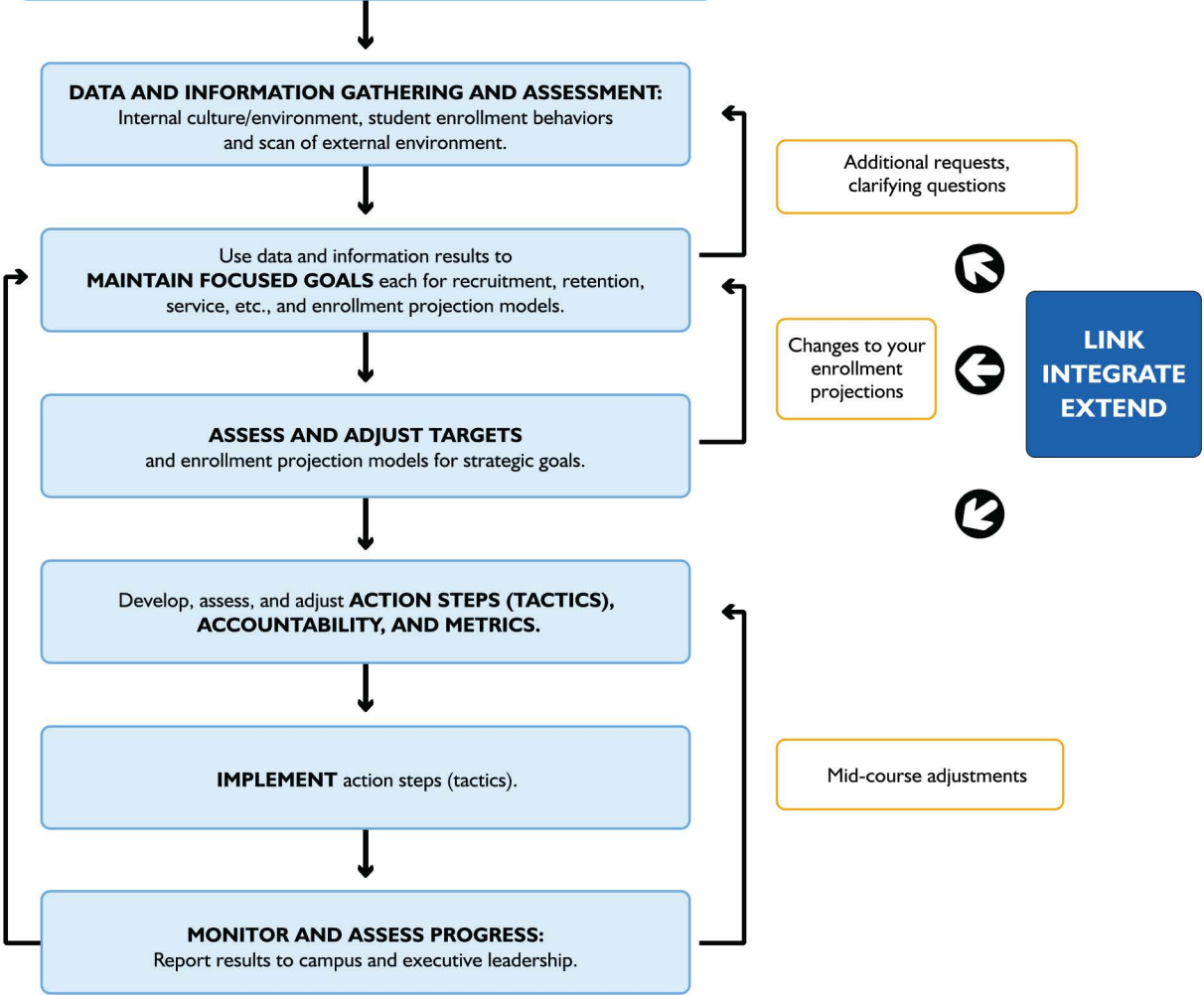
Additional requests, clarifying questions

Changes to your enrollment projections

**LINK
INTEGRATE
EXTEND**

Mid-course adjustments

New or revised targets



THANK YOU!
Questions?



GET IN TOUCH

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