CORE CONCEPTS OF ENROLLMENT MANAGEMENT

Strategic Enrollment Management 101 (SEM 101)
Managing enrollment is a journey!

Where were we...
Where are we now...
Where are we going...
How did we get here?

Part 1: Enrollment Management 101 – Conceptual Overview
- SEM Defined
- Theory and Practice of SEM
- Organizational Approaches to SEM
- Creating Effective SEM Organizations – Collaborations
- SEM Planning

Part 2: State of Current SRU Enrollment Planning and Practices and the Challenges and Opportunities in the Future
SEM Workshop Introduction

**POST-IT I**

Managing Enrollment Takes a Village

- List your area/dept/office and one activity, service, or experience in which you work to accomplish a goal for the purpose of recruiting and retaining our students

**POST-IT II**

Take Away

- Name something that you would like to take away from this experience
SEM: “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. (Dolence, 1993)
What would you add to the concept of optimum enrollment at SRU?
"An institution’s academic program is inexorably co-dependent on enrollment management. The quality of the academic program can only be developed and maintained in a stable environment, and stable enrollments are only possible through sound planning..."

Anticipating Sustainable Market Demand

(Dolence, 1993)
All may want **better** students
Administration may want **more** students
Faculty usually want **fewer** students
Departments may be **reducing** capacity
Access vs. Quality
The SEM Template: A Roadmap for Campus Units

**Stabilize enrollments** – Stop declining enrollment, control growth, stabilize growth, and smooth out fluctuations in academic programs.

**Link academic programs and SEM** – Align the principles of SEM with those of the academic nature of the institution.

**Stabilize finances** – Eliminate deficits, pay off debts, reinvestment strategies.

**Optimize resources** – Contain growth in the number of employees and redirect and refocus employees to meet current and future needs.

**Improve services** – Shorten response time and reduce paperwork (SIS & Reporting)

**Improve quality of service/processing** – Eliminate errors, increase “delight,” and increase student quality ratings.

**Improve access to information** – Put information systems online.

**Reduce vulnerability to environmental forces** – Mitigate the negative impact of local and regional events and expand the pool of qualified prospects.

**Evaluate strategies and tactics** – Be certain strategies and tactics are purposeful and intentional. Track and assess what works and change what doesn’t.

(Dolence, 1993)
What SEM Is Not...

- a quick fix
- all about structure
- a glorified admissions and marketing structure
- function that operates separately from academic mission of the institution
Leadership: No EM system or organization can be anything more than incremental without support and understanding from the institutional leadership.

Strategic Planning: EM is a form of strategic planning and must be tied to the institution’s strategic plan.

Comprehensiveness: EM cannot operate in a silo. Collaborations, partnerships, and alliances are important to EM success.

Key Performance Indicators (KPIs): Institutions must identify and track progress on specific metrics that reflect the institution’s goals.

Research-Use of metrics and analytics: Analysis of data and information must inform strategies and decision-making.

Academic Foundation: SEM must function in the academic context of the institution.

Information Technology: State of the art information systems are essential to provide service, track data, and inform decision-making.

Assessment: Assessment of strategies’ effectiveness is essential to allow feedback for change

(Henderson 2001, adapted from Dolence 1999)
FIVE Important Characteristics of SEM Contribute to Success Factors

- **SEM is SHARED GOVERNANCE** - Create an environment whereby academic, student, fiscal, & facility administrators and faculty feel responsible for SEM.

- **SEM is INTEGRATED INSTITUTIONAL PLANNING** - Speaks the voice of the campus, representing the academic strengths and institutional messaging and has access to data and experience that tell the institution what students and parents want/need/expect.

- **SEM is FOCUSED ON SERVICE** - Service is more important than structure. Business practices flow from the academic foundation of the institution and the business of the campus is academic success.

- **SEM is FOCUSED ON KPIs** - KPIs are placeholders for the institutional values of the SEM Ethos. Data, survey assessments, and research - Assessing what matters.

- **SEM is FOR THE LONG HAUL** - SEM is never finished...”Are we there yet???” SEM must evolve and remain fluid and responsive to the external environment and institutional culture.

  
  Celebrate Successes Along the Journey
Academic Affairs/Student Affairs debate misses the point

**Placement** of a structure is not as important as its **connection** with academics and how EM connects with the academic functions

EM will not succeed unless it is part of the academic fabric of the institution
Taking The Easy Road

- Structure gives a sense of *false reality* that the structure will provide the solution

- Steering committees, planning groups, working groups become the *embodiment of SEM*

- Easier to concentrate on structure than to deal with the really hard work of staying in touch with the academic context and the importance of building community and collaborations
The ES directors meet once monthly for program/service planning.

The ES directors meet once a semester with student life and student accounts directors, and a smaller group of enrollment directors meet periodically throughout the academic year for program planning.

Smaller collaborative groups meet regularly for program planning.

Individual ES area meetings with APES – Monthly

Enrollment Council Planning – Enrollment Leadership – Twice Yearly/As needed
An organizational concept and systematic set of activities designed to exert more influence over their student enrollments. Organized by strategic planning and supported by institutional research, enrollment management activities concern student college choice, transition to college, student attrition and retention, and student outcomes. These processes are studied to guide institutional practices in the areas of new student recruitment and financial aid, student support services, curriculum development and other academic areas that affect enrollments, student persistence, and student outcomes from college.

(Hossler and Bean, 1990)
As a professional literature, Enrollment Management emerged in the 1980s.

As a professional practice, Enrollment Management evolved in the mid-1990s.

In the new millennium, Enrollment Management has evolved as a strategic component of institutional planning....
Enrollment Management is just now coming of age.

Over the first 10 years of the new millennium, what is Enrollment Management being marked by the increased emphasis on ???

- Programs and services designed with intentionality, purpose, integration of effort, service efficiency, and positive interventions with students.
- Integrated cross-campus collaborations and partnerships between faculty, administrators, and staff.
- Use of assessment, information-driven decision making reporting and analytics, and predictive modeling applications.
- Understanding how campus cultures impact enrollment management efforts.
- Importance of shared leadership at multiple levels.

*These five threads are stitched through the EM tapestry.*
Strategic enrollment management is a concept and process that enables the fulfillment of institutional mission and students’ educational goals.

As a concept and process, SEM embodies:

- specific goals, strategies, and tactics which are revealed through

  * programs
  * series of actions & activities
  * structure
  * communications
  * working groups
  * collaborations
  * partnerships
  * alliances

(Kemmer, Baldridge, and Green, 1982)
Enrollment management is an institutional balancing act.

- **Enrollment Goals**
  - (3% annually in 1st 5 yrs/1-2% annually in 2nd five years/Flat to 1% annually in next 5 years)

- **Quest for Maintaining Quality** (SAT, HSGPA, RANK) – Admit students who will succeed at SRU

- **Strive to Grow Particular Academic Programs and Maintain Enrollment in Others**

- **Increase Scholarship, Need-Based Aid, & Aid aimed at specific values (leadership)**

- **Increase Diversity** (URM-AA-H-M)

- **Ensuring Access and Affordability**

- **Increasing Net Tuition Revenue** (winter and summer online enrollments are important elements of enrollment)

- **Increasing Retention & Graduation Rates**

- **Improving Student Learning Outcomes**

- **Improving Student Involvement and Engagement**

*What else do we strive to balance as part of a SEM?*
What Impacts the EM Environment?

- Demographic shifts
- Changing economics of higher education
- The public policy and the legislative environment
- The changing competition
- The “Information Age” - Online
- The “Communication Age” –
- Social Media Networks
- Online, Print, and Phone Communications

What other factors impact the EM environment???
The Purposes of SEM are Achieved by... (6 Planning Steps)

1. Establishing clear goals and planning efforts for the optimal enrollment (number and types of students) needed to fulfill the institutional mission

2. Promoting students’ academic success by improving access, transition, persistence, and graduation

3. Promoting institutional success by enabling effective strategic and financial planning
The Purposes of SEM are Achieved by…

4. Creating a data-rich and analytic environment to inform decisions and evaluate strategies – meaningful metrics

5. Improving process, organizational, and financial efficiency

6. Strengthening communications and collaboration across the campus
Integration of SEM: A Map for the Future

- Administrative Orientation to SEM
  - Process and business practices
  - Reengineering processes
  - How to use technology, the Web, & comm tools
  - Process efficiency & effective use of resources

- Student-Faculty Orientation to SEM
  - Student development theory
  - Leadership training
  - Experiential training

- Academic Orientation to SEM
  - Academic Major 1st
  - Academic program, curriculum, research, & teaching

- Marketing Orientation to SEM
  - External market perspective
  - Institutional marketing position

End Goals

Student Success
And
The Academic Mission
of the Institution
SEM is a Journey

- SEM requires **systems thinking**
- SEM requires **strategic thinking**
- SEM is **resource hungry** and it is all about **ROI**
- SEM is **growth by substitution** (can’t do it unless you take something away) – “Good to Great”
It is a comprehensive and collaborative process strategically designed to achieve and maintain the optimum enrollment of students through both the recruitment and retention processes where “optimum” is defined within the context of SRU’s academic programs.

SEM Guiding Principles:

- Represents an active responsibility of everyone
- Requires an understanding of institutional culture(s)
- Requires that one must learn what works and what does not
- Strives for effectiveness and efficiency through assessment and planning
Primary Ways to Maintain, Increase, or Shape Enrollment

- Increase and/or improve the inquiry pool – Relationship Building
- Improve yield and conversion rates through the recruitment/admissions funnel processes (ex. admit/offer to deposit/enrollment) – Relationships and Marketing
- Offer admission to a greater number of students
- Use scholarships to attract higher achieving students
- Improve need based scholarship opportunities and financial aid packaging
- Improve the academic program mix and diversify the delivery mode
- Improve marketing strategies – Segment marketing strategies and focus on academic program excellence and outcomes such as internships and career connections
- Improve student learning outcomes and student success experiences
- Improve student involvement and engagement experiences
- Improve academic support programs/transitional services/advisement
- Improve facilities (academic, social, and living environment)

Shaping enrollment is defined within the academic mission and culture of the institution.
Since 1999 SRU enrollment strategies have included strategic measures to:

- Focus on increasing enrollment (after a nine year enrollment decline), which shifted to stabilizing enrollments (Freshman, Transfer, Graduate, Off-Campus) to maintaining enrollment and finding new avenues for growing enrollment.
- Improve quality of new admits and reduce the number of qualified-admit students (academically at risk students)
- Link intentionally marketing and recruitment strategies, academic programs (faculty), student services, and information technology to the enrollment management process
- Evaluate processes, procedures, and policies to improve service
- Evaluate recruitment and retention strategies and tactics
- Optimize use of electronic, print, & in-person resources - Alignment
- Improve in-person and online service delivery and experiences (student delight)
- Improve access to online information and drive information outward
- Reduce vulnerability to the environment/stabilize finances
SEM is About Building Relationships with Students

Building a Comprehensive Approach to Enrollment Planning

- Enhance alumni relations
- Target/Segment/Develop relationships with prospective students to initiate application
- Cultivate relationships with specific groups of applicants
- Provide enrolled students with comprehensive orientation and transition services
  - "segmentation of strategies – online, outreach, interventions"
- Delight-Satisfy Students Know What Students Need/Want to be Successful
- Assist students’ success as they transition to work and graduate school
- Assist students’ success throughout their college experience

Match marketing strategies to specific enrollment goals
- "academic programs"
- "diversity"
- "quality"
- "relationships w/ faculty"
The Four Faces of SEM

Structural Management & Administration
Planning
Leadership
Community

(Smith and Kilgore 2006; Henderson and Yale 2008)
Structural Management & Administration

Focuses on the management and administration of those departments and functions formally charged with achieving the institution’s enrollment goals.

**SEM decisions focus on optimal resource allocation to achieve enrollment goals and may include the following...**

- Marketing and media buys
- Right mix of staff to provide recruitment, admissions, and retention services
- Right mix of need-based, merit-based, and other defined scholarship and financial aid packaging
- Course offerings in LSP and specific majors to maximize student learning and success
- Appropriate scheduling to maximize the utilization of classroom stock for optimal enrollment
- Efficient and timely service to students
- Appropriate procedures for academic policy
- Right mix and timeliness of student intervention initiatives
- Appropriate upgrade of technology applications and hardware
- Appropriate upgrade of academic and living facilities.

*In what other ways might we interpret the structural management of SEM???
Planning

Focuses on the outward- and forward-looking at activities that guide the institution’s pursuit of its preferred future in a constantly changing and competitive environment

- Servicing the campus community members by providing the tools to do their work successfully

Focuses on long-range planning and institution-wide strategy development may include...

- Strategic development of new curricula & academic programs that meet current and prospective student demand – Growth of graduate programs
- Facilities development and renovation
- Branding and image campaigns
- Investments in technology environment
- Pricing (Tuition, Fee, Room, and Board AND FA Packaging and Scholarship Decisions)
- Retention planning programs (early alert interventions, first year seminar, learning communities, academic support services, academic advising, sophomore through senior support, etc.)

In what other ways might we interpret the planning face of SEM???
Leadership

Without senior executive leadership understanding and involvement in driving SEM, its success will be limited.

Top-down leadership alone is not sufficient. Leadership must exist at multiple levels.

Focuses on leadership as a shared responsibility—occurring at all levels and deeply embedded in the way the institution works as an organization on a day-to-day basis.

- No Silos
- Enabling Leadership at Multiple Levels
- Servant Leadership

Engender trust from those they must lead

Communicate a sense of purpose

Motivate people to set goals, develop strategies, and a means of assessment.
Consider Elements of Campus Culture

Unpacking Campus Culture

- Pervasive attitude to not be content to rest on past success.
- Sense of inclusiveness on the part of all members of the campus community frequently characterized as a “family.”
- A strongly held sense of mission that recognizes the campus as “distinctive” or “special.” “The people are special.”

A Matter of Culture and Leadership: Student Success in State Colleges and Universities, AASCU, 2005
“Culture” is the social glue that holds the institution together.

- Our solutions and adaptations are dependent on the capacity for innovation and creativity which resides within each individual who is part of the culture.

The culture is a pattern of meanings and shared assumptions that emerge from both individual and organizational behavior and is matched with the opportunities and threats coming from the environment.
Leaders can…

- help to develop a constant spirit of healthy restlessness to become even better at what they do.
- create an environment rich with experimentation.
- set high expectations that can be met, provide support and example to meet them, then raise the bar another notch.
- foster cultures of student success experiences deliberately through consistent actions and visible allocations of scarce resources.

Empowerment for Decision-Making
Encourages Risk-Taking and Assumption of Responsibility
Encourages Active Problem-Solving

Shedding of “territoriality”

Budgeting Personnel Space
Community

- The community of SEM is about building relationships.
- "Culture" is really the community and its members.

- Structure should facilitate seamless services, create open channels for feedback, and foster creativity.

- Planning is strategic as well as collaborative. Inculcating a culture of service that emphasizes participation, collaboration, and contribution in SEM can take a campus to new levels of enrollment health.
Integrating the 4 Faces of SEM (management, planning, leadership, community) requires that we focus not on individual functions and departments but on the entire enrollment process.
Institutions Organize for SEM in Different Ways
Presentation of a Continuum of EM Structures

The Enrollment Management...

- Committee
- Coordinator
- Matrix
- Division

(Kemerer, Baldridge, and Green, 1982)
Committee Model – “Marching Millions”

- Academic Policy Sub-Committee
- SEM Steering Committee
- Retention Sub-Committee
- Financial Aid Sub-Committee
- Admissions Sub-Committee
Coordinator Model – “Somebody has enough time”

- Academic Affairs
- Information Systems
- SEM Coordinator
- Student Affairs
- Administrative Operations
Matrix Model – “Shared Turf” – Multiple Senior Officers Cooperating to Reach EM Goals

SEM Coordinator
(upper level administrator)

Academic Affairs

Information Systems

Student Affairs

Administrative Operations
Divisional Model

Vice President/Dean/Assoc Provost for Enrollment Management

- Recruitment/Admissions Representative
- Registrar/Registration Representative
- Career Center Representative
- Retention Representative
- Financial Aid Representative
- Marketing Representative

Vice President/Dean/Assoc Provost for Enrollment Management
How are institutions today approaching enrollment management?

- Committee ???
- Coordinator ???
- Matrix ???
- Division ???
SEM Organizational Effectiveness Scale

**Structural type**
- Committee
- Coordinator
- Matrix
- Division

**Commitment To change**
- Lower
- Higher

**Expertise of Lead EM staff**
- Less
- More

**Enrollment results**
- Weaker
- Stronger
Composition of SEM Organizations (Conceptual, not definitive)

**BASIC**

- Admissions
- Financial Aid
- Orientation
- Registrar
- Enrollment Research/IR
- Retention
Composition of SEM Organizations

**BASIC**
- Admissions
- Financial Aid
- Orientation
- Registrar
- Enrollment
- Research
- Retention

**EXPANDED**
Pre-College Programs
Academic Support Programs
Academic Advising
Career Services
Composition of SEM Organizations

**BASIC**
- Admissions
- Financial Aid
- Orientation
- Registrar
- Enrollment
- Research
- Retention

**EXPANDED**
- Pre-College Programs
- Academic Support Programs
- Academic Advising
- Career Services

**COMPREHENSIVE**
- Institutional Research
- Marketing
- Community Relations
- Alumni Relations
SEM Transition Model: When do

Denial
Nominal
Structural
Tactical
Strategic

Adapted from Dolence
SEM Transition Model: Denial

**Enrollment Trend:** Down

**Institutional Messages**
- “The downturn is temporary.”
- “It’s just (pick one) demographics/the economy/our competitors.”
- “We are subject to forces beyond our control.”

**Institutional Action**
- Form a committee
- Discuss options
SEM Transition Model: Nominal

- **Enrollment Trend:** Down

- **Institutional Messages**
  - “We have to do something.”
  - “We need a ‘silver bullet’ recruiting/marketing strategy.”

- **Institutional Action**
  - EM is a new name for admissions
  - Fund ad hoc, short-term strategies lacking enrollment management expertise
  - More discussion
SEM Transition Model: Structural

- Enrollment Trend: Variable

- Institutional Message
  - “This isn’t as easy as we thought.”

- Institutional Action
  - Limited restructuring: EM committee or other organizational structure
  - EM begins to integrate enrollment-related activities
  - EM focuses inward on improving effectiveness, efficiency, & integration
  - EM keeps hands off the academic enterprise
  - Continue with short-term strategies with minimal enrollment management expertise
  - CI improvement process – Not retention
SEM Transition Model: Tactical

**Enrollment Trend:** Building to optimum enrollments

**Institutional Message**
- "To achieve optimum enrollments will require fundamental changes."

**Institutional Action**
- Substantive restructuring: EM begins to look outward & forward
- EM begins to redesign processes & functions
- EM drives revenue planning (not revenue planning driving SEM)
- EM embraced as a comprehensive process
- EM “holds hands” with academic enterprise
- EM goals are adopted
- Strategic planning based on reliable data
- Strong enrollment management expertise
- Targeted funding
SEM Transition Model: **Strategic**

- **Enrollment Trend:** Achieving optimum enrollments

- **Institutional Message**
  - "We control our enrollment outcomes."

- **Institutional Action**
  - Stable organizational structure and funding
  - Top-level EM leadership
  - Alignment ahead of the changing environment
  - EM integrates institutional decision-making process
  - EM is fused with academic enterprise
  - EM embedded in institutional planning
  - Consistent planning and assessment cycle
SEM Transitions

SEM Structures

Strategic

Tactical

Structural

Nominal

Denial

Division

Matrix

Coordinator

Committee

Committee Coordinator Matrix Division SEM Structures
Enrollment Management Through the Academic Lens

Let’s Consider the Enrollment Funnel
We would be inattentive if we didn’t introduce the enrollment funnel in our planning effort…..but, it does not provide sufficient attention to “continuing” students’ experience.
Moving from the traditional enrollment management perspective....

- Recruitment / Marketing
- Orientation
- Classroom experience
- Co-curricular support
- Degree/goal attainment

- Admission
- Financial support
- Academic support
- Retention
- Alumni

Student’s Experiences
Turning the enrollment funnel on it’s side.....to express progression forward....and emphasize the multi-dimensional processes that exist.
Enrollment Management Through the Academic Lens

The Relationship of EM and Student Success
A Word About the “Student Success” Conundrum” - Varying Definitions of Success

- May define success as achieving their goals as they define them
- May define success as higher retention and graduation rates
- May define success as active involvement in academic, co-curricular, and social life or
  May align with state definition
- May define success as achieving their goals as they define them

Davenport, Martinex-Saenz, and Rhine, 2012
Multiple Dimensions to Student Success

- Student flow through the institution and persistence to degree
  - Retention = Early Identification + Early, Intensive, and Continuous Interventions
  - Admission to Enrollment to Timely and Satisfactory Completion of Degree Requirements, Major Declaration, to Graduation
- Quality and content of learning, knowledge and skill attainment, and
  - Student learning based models based on what students know and what they can do (Qualitative and Quantitative)
- Positive engagement experiences.
  - Experiences that MATTER to enhance student learning and success
  - High-Impact Experiences – Enable student learning – and retention will follow...i.e. Retention is a by-product of successful programs.

Ewell and Wellman (2007)
Cluster in groups with individuals that you don’t’ work with daily

Rose, Bud, Thorn Exercise

- **Rose** – Activities, services, programs, processes that relate to improving student success
- **Bud** – Activities, services, programs, and processes that could be roses with just some improvements, changes, or adjustments.
- **Thorns** – What is not going well as it related to improving student success?

Cluster similar activities, services, programs, processes, or general responses.
Enrollment Management Through the Academic Lens

The Value of Collaboration and Constructive Conflict in a SEM Environment
Collaboration Matters

Collaboration Barriers – Institutions and institutional staff that comprise them may exhibit counterproductive behaviors that complicate our ability to address student success comprehensively.

People – Policies – Procedures

Collaboration Barrier Causes –

- Fear
- Information Flow or Lack of Communication
- Shorter Term Thinking
- Misalignment
- Money

(Reiger, 2011)
Constructive Conflict Management in SEM

Sources of SEM Conflict – Important Discussion

- Disagreement may be about how to allocate scarce resources
- Disagreement may be about who has the right to control a situation
- Disagreements may be about how to treat someone with respect; about whether we are being treated with respect
- Disagreement may be about the goals or outcomes to be achieved
- Disagreement may be about the process, procedure, or methods to get a desired outcome

(Jones, Renland, & Sanford, 2008)
Building a Constructive Conflict & Change Culture

Reasons for Resistance: Understanding the Difficulties in Developing a Constructive Conflict & Change Environment...

- Unfavorable experiences with change in the past
- Organizational goals they don’t share
- Concerns about changes in productivity demands
- Unfavorable climate created during change
- Loss incurred by change
- Poorly planned change
- Ready, fire, aim change process
- Change for change’s sake

(Conrad & Pool, 2007)
What it IS...

- Effective and Open Communication
- Supportive Leadership at Multiple Levels
- Policy and Procedure Clarity
- Sufficient Resources
- Skilled Members
- Non-Collaborative Processes
- Integrated Systems
- Assessment Processes
Cluster in groups with individuals that you don’t’ work with daily

Rose, Bud, Thorn Exercise **Applied to Collaborative Initiatives**

- **Rose** – Activities, services, programs, processes that are going well as related to good examples of collaborations
- **Bud** – Activities, services, programs, and processes that could be roses with just some improvements, changes, or adjustments could be good examples of collaborations
- **Thorns** – Where is there room for the initiation of collaborations or the improvement of collaborations?

Cluster similar activities, services, programs, processes, or general responses.
Enrollment Management Through the Academic Lens

SEM Planning
Improving Our Enrollment Planning Efforts

Premise:

- Simply finding “best practices” somewhere and “plugging them in” is unlikely to be effective.

- Overall campus culture within which these practices are deployed and the quality of presidential, faculty leadership, and administrative leadership that keep them moving and coordinated.

Look for ways to create a campus attitude and climate that is consistently focused on meeting student needs and helping students succeed.
Many different elements must come together in a coordinated way for SEM planning to be effective.

None is more important than developing leadership at multiple levels of the institution and encouraging partnerships across departments and divisions.
SRU SEM Results

- Increased Enrollments (Headcount, FTE, Credit Hours Generated)
- Improved Quality
- Increased Diversity
- Increased Academic Program Interest – Niche Programs
- Increased Out-of-State students
- Increased Regional Enrollments - Beyond the 100 mile stretch
- Increased Transfers (all levels/all institution types) - PACC
- Increased Transfer Institution Collaborations
- Increased Retention – All Class Levels
- Increased Graduation and Degree Completion Rates
- Improved Program Attendance and Service Usage
- Improved Student Involvement and Engagement
Credit hours generated have risen steadily from 1999 to 2010. Over this timeframe we have realized a 30% increase in credit hours generated.

The enrollment credit hour decrease for the 2012-2013 year was at -1.3% (-1536 credit hours decrease).
Headcount (Year to Date Comparisons)

26% increase since 1999

![Bar chart showing enrollment trends from 1994 to 2012. The chart indicates a significant increase in enrollment, with enrollment numbers in thousands for each year as follows:

- 1994: 7563
- 1995: 7493
- 1996: 7291
- 1997: 7038
- 1998: 6923
- 1999: 6803
- 2000: 6952
- 2001: 7197
- 2002: 7530
- 2003: 7789
- 2004: 7928
- 2005: 8105
- 2006: 8230
- 2007: 8325
- 2008: 8458
- 2009: 8648
- 2010: 8852
- 2011: 8712
- 2012: 8559

The chart visually represents the steady increase in enrollment over the years.}
New First Time Full Time Students

Improve quality and selectivity of first year students while increasing the persistence of continuing students and recruitment of new transfers and graduate students.
Increased size of African-American first year cohort by 123% since 2001

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### Percent of New First Time Full Time Enrollment by College Over Ten Years

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#### Twelve Year Comparison of Enrollment Change

- Exploratory decreased by 11%
- Education decreased by 18%
- HFPA increased by 2%
- HES increased by 13%
- BISS increased by 13%
### Most Frequently Selected Academic Majors - First Year Students

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## New Freshman Demographic Information

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### Additional major increases were also realized in the following counties:

- Clearfield
- Jefferson
- Blair
- Clarion
- North Hampton
- Montgomery
- Lancaster
- York

### Top 5 States

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### Gender

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### Out-of-State

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Fall 2012 New Transfer Students

Year | Number
---|---
2002 | 518
2003 | 562
2004 | 525
2005 | 605
2006 | 593
2007 | 574
2008 | 637
2009 | 689
2010 | 613
2011 | 597
2012 | 626
# New Transfer Student Demographic Information

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<td>51%</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>International</td>
<td>13</td>
<td>3</td>
<td>19</td>
<td>20</td>
<td>22</td>
<td>24</td>
<td>23</td>
<td>32</td>
</tr>
</tbody>
</table>
## Most Frequently Selected Academic Majors – New Transfer Students

### Enrolled New Transfer Students by Major

<table>
<thead>
<tr>
<th></th>
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<th></th>
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<tbody>
<tr>
<td>School of Business</td>
<td>95</td>
<td>79</td>
<td>71</td>
<td>87</td>
<td>90</td>
<td>78</td>
<td>82</td>
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<tr>
<td>Exploratory (EDUC Pre-major)</td>
<td>13</td>
<td>69</td>
<td>64</td>
<td>57</td>
<td>60</td>
<td>44</td>
<td>67</td>
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<td>Nursing</td>
<td>54</td>
<td>28</td>
<td>49</td>
<td>56</td>
<td>43</td>
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<td>Elementary Education</td>
<td>16</td>
<td>21</td>
<td>32</td>
<td>35</td>
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<td>33</td>
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<tr>
<td>Criminology &amp; Criminal Justice</td>
<td>34</td>
<td>36</td>
<td>32</td>
<td>52</td>
<td>26</td>
<td>29</td>
<td>11</td>
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<td>Exercise Science</td>
<td>28</td>
<td>22</td>
<td>31</td>
<td>25</td>
<td>25</td>
<td>17</td>
<td>14</td>
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<tr>
<td>Exploratory (NOT pre-major)</td>
<td>36</td>
<td>30</td>
<td>30</td>
<td>37</td>
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<td>49</td>
<td>34</td>
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<tr>
<td>Biology</td>
<td>14</td>
<td>28</td>
<td>27</td>
<td>40</td>
<td>21</td>
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<td>19</td>
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<td>Physical Education</td>
<td>9</td>
<td>13</td>
<td>25</td>
<td>27</td>
<td>14</td>
<td>30</td>
<td>19</td>
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<tr>
<td>Parks &amp; Rec/ Resort Mgmt</td>
<td>27</td>
<td>28</td>
<td>23</td>
<td>17</td>
<td>29</td>
<td>31</td>
<td>23</td>
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<td>Communication</td>
<td>26</td>
<td>19</td>
<td>22</td>
<td>20</td>
<td>21</td>
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<td>22</td>
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<tr>
<td>Special Education</td>
<td>28</td>
<td>25</td>
<td>21</td>
<td>15</td>
<td>30</td>
<td>24</td>
<td>27</td>
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<tr>
<td>Sport Management</td>
<td>11</td>
<td>11</td>
<td>19</td>
<td>12</td>
<td>12</td>
<td>18</td>
<td>23</td>
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<tr>
<td>Computer Sci/Inf Sci (all)</td>
<td>25</td>
<td>12</td>
<td>18</td>
<td>26</td>
<td>20</td>
<td>15</td>
<td>24</td>
</tr>
<tr>
<td>Safety Management</td>
<td>11</td>
<td>11</td>
<td>10</td>
<td>15</td>
<td>20</td>
<td>10</td>
<td>17</td>
</tr>
</tbody>
</table>
3.3% increase in out-of-state residence as compared to last year
183% increase in out-of-state residence since 2003
Ten Year Fall Comparison of Undergraduate International Residents

12% increase in undergraduate international residents as compared to last year
-50% decrease in undergraduate international residents since 2003
- 8.2% decrease in Post-Baccalaureate enrollment as compared to last year
- 37% decrease in Post-Baccalaureate enrollment since 2003
Fall 2012 New Graduate Students

*Primarily represents decreases in educational programs, criminal justice, history, parks and recreation, and sustainable systems
## Slippery Rock University: Retention and Graduation Rates

### Full-time, First-time, Degree Seeking Freshmen

<table>
<thead>
<tr>
<th>Cohort Year</th>
<th>Adjusted Head Count*</th>
<th>Average SAT</th>
<th>Continued to 2nd Yr</th>
<th>Continued to 3rd Yr</th>
<th>Continued to 4th Yr</th>
<th>Graduated in 4 Yrs</th>
<th>Continued to 5th Yr</th>
<th>Graduated in 5 Yrs</th>
<th>Continued to 6th Yr</th>
<th>Graduated in 6 Yrs</th>
<th>Continued to 7th Yr</th>
<th>Graduated in 7 Yrs</th>
<th>Continued to 8th Yr</th>
<th>Graduated in 8 Yrs</th>
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</thead>
<tbody>
<tr>
<td>2002</td>
<td>1421</td>
<td>959</td>
<td>78.0%</td>
<td>68.5%</td>
<td>64.3%</td>
<td>29.3%</td>
<td>31.8%</td>
<td>54.8%</td>
<td>5.7%</td>
<td>59.2%</td>
<td>1.0%</td>
<td>60.0%</td>
<td>0.6%</td>
<td>60.3%</td>
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<tr>
<td>2003</td>
<td>1469</td>
<td>990</td>
<td>76.9%</td>
<td>66.7%</td>
<td>62.3%</td>
<td>30.9%</td>
<td>29.1%</td>
<td>52.8%</td>
<td>5.6%</td>
<td>57.7%</td>
<td>1.5%</td>
<td>58.7%</td>
<td>0.7%</td>
<td>59.1%</td>
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<tr>
<td>2004</td>
<td>1532</td>
<td>983</td>
<td>77.6%</td>
<td>67.7%</td>
<td>64.2%</td>
<td>36.0%</td>
<td>26.1%</td>
<td>57.8%</td>
<td>4.2%</td>
<td>60.6%</td>
<td>1.0%</td>
<td>61.4%</td>
<td>0.5%</td>
<td>61.8%</td>
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<tr>
<td>2005</td>
<td>1457</td>
<td>1002</td>
<td>75.8%</td>
<td>67.4%</td>
<td>63.0%</td>
<td>38.2%</td>
<td>21.9%</td>
<td>56.1%</td>
<td>3.0%</td>
<td>59.1%</td>
<td>0.6%</td>
<td>59.9%</td>
<td>0.2%</td>
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<td>2006</td>
<td>1416</td>
<td>1004</td>
<td>77.9%</td>
<td>70.3%</td>
<td>65.2%</td>
<td>37.4%</td>
<td>23.7%</td>
<td>59.0%</td>
<td>2.8%</td>
<td>61.9%</td>
<td>0.7%</td>
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<tr>
<td>2007</td>
<td>1498</td>
<td>1002</td>
<td>78.8%</td>
<td>70.3%</td>
<td>67.2%</td>
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<td>24.8%</td>
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<td>2008</td>
<td>1527</td>
<td>1031</td>
<td>80.6%</td>
<td>74.3%</td>
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<td>48.7%</td>
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<tr>
<td>2009</td>
<td>1534</td>
<td>1026</td>
<td>81.5%</td>
<td>73.4%</td>
<td>68.6%</td>
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<tr>
<td>2010</td>
<td>1570</td>
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<td>81.1%</td>
<td>73.8%</td>
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</tr>
<tr>
<td>2011</td>
<td>1530</td>
<td>1015</td>
<td>81.2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>2012</td>
<td>1544</td>
<td>1010</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
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</tr>
</tbody>
</table>

* Percentages may not compute based upon displayed headcounts. Cohort headcounts are adjusted for allowable exclusions (such as military obligations, religious reasons, service in the Peace Corps, or the student is deceased). The percentages shown are historic and do not change.
1. No single factor caused our enrollment decline and no single act would change the trend.

2. We had to move from “enrollment by chance” to “enrollment by design”.

3. Strategic enrollment planning had to become part of the culture of the entire campus.
Why Planning???

Not fully in control of our destinies, but we can use knowledge of our environments to maximize control of our outcomes.

Demographics does not define destiny.
An institutional understanding of strategic issues and a systems approach to achieving objectives can create a “synergy” that fosters success.

In the beginning we identified some strategies for providing immediate successes...

We couldn’t wait until we created the “perfect” plan. We decided to implement and evaluate specific strategic services, programs, and activities designed to bring success in recruiting new students and retaining our continuing students.
The SEM Process Framework – Multiple Levels of Leadership

Process Steps

- Align institutional strategic plan with broad enrollment targets and desired mix of students
- Data and information gathering and assessments: Internal culture/environment, student enrollment behaviors and scan of external environment
- Use data and information results to establish focused goals each for recruitment, retention, service, etc., and enrollment projection models.
- Approve strategic goals and enrollment projection models.
- Develop action steps, accountability, and metrics.
- Implement action steps.
- Monitor progress, Report results to campus and executive leadership

Performed by

- Executive Leadership
- Smaller group of staff and faculty adept at use of data
- Broad group of faculty, staff and students – SEM councils, IR, Service Leadership
- Executive Leadership
- SEM Leadership and Working Groups
- Appropriate Service Leadership and Faculty Departments
- SEM Leadership and Chief Enrollment Leadership
Components of a SEM Plan

Planning Process

- SWOT Analysis
- Environmental Scan
- Vision & Mission
- Values
- Goals Objectives Strategies
- Research and Data-Driven Decision Making
- Operational Analysis Strategies
- Current and Future Demographics
- Gap Analysis

Planning Process Components:

- Goals
- Objectives
- Strategies
- Values
- Vision & Mission
- Research and Data-Driven Decision Making
- Operational Analysis Strategies
- Current and Future Demographics
- Gap Analysis

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Components of a SEM Plan:

Planning Process

- SWOT Analysis
- Environmental Scan
- Vision & Mission
- Values
- Goals Objectives Strategies
- Research and Data-Driven Decision Making
- Operational Analysis Strategies
- Current and Future Demographics
- Gap Analysis
Begins with a clearly defined vision as it relates to institutional mission;
Performs an internal and external environmental analysis and forecasts future trends;
Recognizes and articulates current position and direction;
Acknowledges problems and constraints as well as opportunities and strengths;
Outlines objectives and desired outcomes and articulates strategies to achieve them;
Determines a budget to achieve each outcome;
Assigns responsibility for strategies to specific individuals;
Sets forth an evaluation mechanism to measure progress and redirect efforts if necessary
SRU’s SEM Plan

Designed to be dynamic and fluid

Represents the changing environment

http://www.sru.edu/academics/enrollment/Pages/StrategicEnrollmentManagementPlan.aspx

The Strategic Enrollment Management Management Plan (SEM) Plan presented here represents the collaborative initiatives, communications, energies and efforts of the Enrollment Services personnel as well as many constituencies across departments and divisions on campus.

The plan is primarily presented in the form of a PowerPoint presentation to represent its dynamic and fluid process. It represents its changing nature as new assessments are examined and responses to the environment necessitate changes to the plan. Every effort was made to avoid creating a plan that would be simply prepared, written, and placed on a shelf to collect dust. Many sections of the plan can be separated apart from the full document for review and presentation purposes.

Sections 2-B and 2-C provide a narrative and a corresponding set of charts highlighting our undergraduate and graduate enrollment data historically. Section 2-D provides a chart of enrollment projections for the next five years.

The SEM plan is comprised of nine (9) sections.

<table>
<thead>
<tr>
<th>Section</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section I</td>
<td>Vision, Mission, and Values</td>
</tr>
<tr>
<td>Section II</td>
<td>A. Institutional EM Goals and Objectives</td>
</tr>
<tr>
<td></td>
<td>B. Enrollment Management at SRU - MS Narrative</td>
</tr>
<tr>
<td></td>
<td>C. EM Charts – Accompanies Section 2B</td>
</tr>
<tr>
<td></td>
<td>D. Five Year Enrollment Projections – 2% (update in progress)</td>
</tr>
<tr>
<td>Section III</td>
<td>Environmental Scan Resources and Marketing Strategies</td>
</tr>
<tr>
<td>Section IV</td>
<td>US NEWS - National Data Comparisons</td>
</tr>
<tr>
<td>Section V</td>
<td>Pennsylvania Demographics</td>
</tr>
<tr>
<td>Section VI</td>
<td>Historical Perspective of SRU’s Enrollment Status</td>
</tr>
<tr>
<td>Section VII</td>
<td>Understanding SRU’s Enrollment Patterns</td>
</tr>
<tr>
<td>Section VIII</td>
<td>ES Undergrad and Grad Recruitment Initiatives</td>
</tr>
<tr>
<td>Section IX</td>
<td>A. ES Divisional Goals, Activities, Services, and Assessments</td>
</tr>
<tr>
<td></td>
<td>B. ES Matrix Program Evaluations and Assessment</td>
</tr>
</tbody>
</table>
Institutional Strategic Planning

http://www.sru.edu/president/strategicplanning/Pages/Home.aspx

- Slippery Rock University’s strategic planning process is designed to provide the university community the strategic guidance that assures the university’s performance matches its purpose and that expected outcomes are achieved.
- The University’s strategic thinking and long-term planning is framed by significant global trends facing the next generation.

- Population
- STM Leadership
- Cultural Awareness
- Access
- Sustainability

- Wellness
- Financial Destiny
- Preserving Our Enrollment
- Sustaining a Quality Faculty and Staff
Four Guiding Planning Principles

- Tracks relentlessly what works & what doesn’t
- Comprehensive approach To changes
- Strategic Enrollment Planning
- Builds from within the campus culture
- Works to get everyone on the same page
5 Keys to Effective Strategic Enrollment Planning

- Focus of the plan is on subsequent implementation
- The plan allows for ordered responses to better handle uncertain/turbulent environments
- The planning process stimulates continual organizational questioning toward meeting existing or new challenges
- Planning elements become intertwined so synergistic outcomes can be achieved
- The planning process ensures that various stakeholder provide frequent input/feedback.

The plan should...

- Be a working action document
- Used virtually every day
- Accessed frequently
- Available to all
- Dynamic and fluid in nature
- Modified regularly
Considerations for the Desired Enrollment State Over the Next 3-5 Years

Defining the Desired Enrollment State:
- Size
- First Year / Transfer / Graduate
- Traditional / Non-Traditional
- Online/Blended/Traditional
- Full Time / Part Time
- Academic Profile
- Financial Profile
- Diversity
- Residential / Commuter
- Geographic Representation
- Major Distribution
- Co-Curricular Interest
- Gender

What are some of the enrollment goals for this fall?

What strategies are in place to try to reach each of these goals?
Assessing the Institutional Environment

Analysis of the external and internal environments
- Understanding the strengths and weaknesses in light of the opportunities and threats it faces
- Environmental analyses are never complete

Matching the external assessment with an internal profile permits us, later in the process, to define our strategic objectives.

Write down one response for each question...

What major external or future opportunities do we have?
- Career opportunities for health related careers
- Career opportunities for STEM and pre-professional programs

What major external or future threats do we face?
- Declining HS Grads for 5 years
- Declining enrollment in education
- Economic challenges
- Rising costs of higher education

What are our major internal or present strengths?
- Academic program quality & accreditations
- New technologies for communications and improving service
- Marketing initiatives focused on academic programs and student outcomes
- Creation of an EM Culture
- Creation of winter session and online summer options

What are our major internal or present weaknesses?
- Stretched resources
- Declining enrollment in education/faculty complement
- Rising cost of higher education
Factors to be considered when you assess the external environment

External Factor Analysis
Trends and events that impact the institution
Understanding of influential factors and their effects
SEM Success depends on degree of alignment with environments

Examples of external factors...
- Local and regional economic conditions
- Institutional costs (tuition, fees, room, & board)
- Differing tuition rates (out of state, international, graduate, pre-professional U/G, etc.)
- Regional market competition
- Consumer attitudes
- Demographic trends
- Popular press & its “rankings”
- State and federal finances
- Impact of the education industry
- Gender imbalance
- Other higher education options for high school graduates
- College in high school options
Factors to be considered as you begin to analyze the internal environment

Impact of Institutional Design on Performance, Strategies, Goals, Objectives, and Resources

Examples of internal factors...

- Tuition Discounting
- Merit Aid, Need Aid, Scholarships
- Fee Costs
- Institutional resources and allocation
- Present strategies and processes
- Performance Indicators (institutional, state, etc) & benchmarks for anchoring analysis
- Faculty and staff commitment to goals
- Work environment on campus
- Internal communications
- Policies and procedures performance
- Strength of academic programs
- Strength of co-curricular programs
- Facilities and maintenance
- Student residential trends
- Quality...diversity...geographic mix of the student body
- Student satisfaction
- Student course-taking patterns
- Faculty/staff workload
- Non-tuition sources of revenue and size of the endowment
Enrollment Management Through the Academic Lens

Demographics and Regional Workforce Needs
SRU Distribution of Enrollment by State

Slippery Rock University Enrollment 2012

Numbers indicate total enrollment by state for the 2012-2013 academic year. Only the 48 contiguous states and the District of Columbia are shown. Enrollment numbers include both undergraduate and graduate students who were enrolled at Slippery Rock University as of the 15th class day for Fall 2012.

Office of Institutional Research
Slippery Rock University of Pennsylvania
SRU Distribution of 2012 Enrollment – 7 State Region

Distribution of Total Enrollment from the Seven State Region
SRU Enrollment Net Change 2011-2012

Slippery Rock University Enrollment
Net Change 2011-2012

Numbers indicate change in enrollment by Pennsylvania county between the 2011-2012 and 2012-2013 academic years. The enrollment numbers include both undergraduate and graduate students who were enrolled at Slippery Rock University as of the 15th day of classes for the fall semester of each year.
Pennsylvania Demographics: Fall 2012 Undergraduate Headcount Enrollment

Top 10 Counties

Erie, Crawford, Warren, McKean, Potter, Tioga, Bradford, Susquehanna, Wayne, Pike

Top 5 counties: 55% of students
Counties 6–10: 14% of students

Source: PASSHE 2012 Fact Book.

We have a map for each of the PASSHE institutions.
Slippery Rock University, Fall 2011 vs. Fall 2012*

New First-Time, Full-Time Freshmen Cohort Headcounts
Students Entering from Pennsylvania Counties

*Reflects fall 15th day census data. Headcounts on left represent students from the Fall 2011 cohort, headcounts on the right represent students from the Fall 2012 cohort. Darker shading areas represent the greatest percentage of new PA county students based upon the Fall 2012 semester.

Office of Institutional Research
Slippery Rock University of Pennsylvania
Slippery Rock University, Fall 2011 vs. Fall 2012*

New Full-Time and Part-Time Transfer Headcounts
Students Entering from Pennsylvania Counties

*Reflects fall 15th day census data. Headcounts on left represent Fall 2011 new transfer students, headcounts on the right represent Fall 2012 new transfer students. Darker shading areas represent the greatest percentage of new PA county students based upon the Fall 2012 semester.
## Public High School Graduates and Postsecondary Education Rates: 2010-11

<table>
<thead>
<tr>
<th>County</th>
<th>Sum of Total Graduates</th>
<th>Sum of Total College-Bound</th>
<th>College going rate</th>
<th>Sum of Total Postsec Bound</th>
<th>Post secondary going rate</th>
<th>Sum of Non-Degree-Granting Postsec School</th>
<th>Sum of Specialized Associate Degree-Granting Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allegheny</td>
<td>10,990</td>
<td>8,858</td>
<td>81%</td>
<td>9,072</td>
<td>83%</td>
<td>214</td>
<td>280</td>
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<tr>
<td>Beaver</td>
<td>1,830</td>
<td>1,379</td>
<td>75%</td>
<td>1,402</td>
<td>77%</td>
<td>23</td>
<td>97</td>
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<tr>
<td>Butler</td>
<td>2,090</td>
<td>1,704</td>
<td>82%</td>
<td>1,756</td>
<td>84%</td>
<td>52</td>
<td>66</td>
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<tr>
<td>Lawrence</td>
<td>925</td>
<td>676</td>
<td>73%</td>
<td>710</td>
<td>77%</td>
<td>34</td>
<td>41</td>
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<tr>
<td>Mercer</td>
<td>1,259</td>
<td>879</td>
<td>70%</td>
<td>928</td>
<td>74%</td>
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### Projected

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<td>2,069</td>
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<td>2,000</td>
<td>1,940</td>
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</table>

Enrollment Management Through the Academic Lens

Regional Workforce Needs
Local Labor Market and Growth Trends
The regional distribution of jobs across different industry sectors resembles the national pattern; Health Care, Professional Services, Finance, and Education are more concentrated in the region.
The region gained almost 70,000 new jobs between 2005 and 2010; 80% of those were in these top 5 clusters.

The region lost over 32,000 existing jobs between 2005 and 2010; 90% of those were in these top 5 clusters.
Local Labor Market, Jobs by Occupations

Unlike the distribution of jobs by industry, the occupational diversity of the regional jobs is lower.

One third of the jobs are concentrated in Administrative and Sales occupations. Half of the jobs are concentrated in six occupational clusters.

<table>
<thead>
<tr>
<th>Occupational Cluster</th>
<th>Number of Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office support</td>
<td>214,388</td>
</tr>
<tr>
<td>Sales</td>
<td>185,780</td>
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<tr>
<td>Food preparation</td>
<td>100,854</td>
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<tr>
<td>Education</td>
<td>86,022</td>
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<td>Management</td>
<td>85,592</td>
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<tr>
<td>Healthcare practitioners</td>
<td>85,312</td>
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<tr>
<td>Transportation</td>
<td>79,859</td>
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<tr>
<td>Construction</td>
<td>71,937</td>
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<tr>
<td>Business and financial</td>
<td>70,535</td>
</tr>
<tr>
<td>Production</td>
<td>69,743</td>
</tr>
<tr>
<td>Installation &amp; maintenance</td>
<td>51,677</td>
</tr>
<tr>
<td>Building cleaning</td>
<td>49,515</td>
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<td>Personal care</td>
<td>46,328</td>
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<tr>
<td>Healthcare support</td>
<td>44,695</td>
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<tr>
<td>Entertainment</td>
<td>36,385</td>
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<tr>
<td>Computer science</td>
<td>31,050</td>
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<tr>
<td>Architecture and engineering</td>
<td>27,638</td>
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<td>Social services</td>
<td>25,510</td>
</tr>
<tr>
<td>Protective Services</td>
<td>22,469</td>
</tr>
</tbody>
</table>
The requirements for current jobs are more technical than academic.

Two-thirds of the regional jobs require less than a bachelor’s degree but some sort of technical training.
A shortage of people with lower education levels is expected.
What are the 21st Century Skills

Tools and frameworks for engaged processes of learning, thinking, working and communicating
The 21st Century Skills in Workforce Development
Using Meaningful Data and Analytics to Inform Decision-Making
Using Metrics in Strategic Enrollment Management

Developing and Supporting a Metric Centered Organization

Who will develop the metrics?

What data is needed to create metrics?

When will metrics be available?

How will metrics be used?

Using Meaningful Data to Inform & Drive Key Decisions
How can “Business Intelligence” (BI) improve institutional effectiveness?

- **BI**: A set of technologies and processes that use data to understand and analyze our performance. These tools provide insight into institutional performance rather than an account of its transactions.
- **BI includes both data access, reporting, and analytics.**

- **SIS/CMS tools** answer questions such as, “What happened, who did it and when did it happen?”
- **BI tools** answer questions such as: “Why did it happen, how will it happen in the future, and what can we do about it?” These types of questions help us to improve institutional effectiveness.

- **SAS & COGNOS BI tools** draw data from multiple sources and provide users with sophisticated models for analysis. By analytics we mean the extensive use of data, statistical and quantitative analysis, explanatory and predictive models, and fact-based reporting used to drive decisions and actions.
Lack of “cleanliness” of institutional data - disparate answers to a common query

Flood of static print reports that result in confusion than in insights into performance

Shadow systems that are maintained at multiple department levels
Today we must have **easily accessible and accurate information** to strategically manage enrollment.

Our institution has massive amounts of information available, but if that information can’t be used to **personalize services, strengthen relationships** or make decisions, its value is diminished.

We wanted to find the quickest and most intuitive way to access enrollment information and **get it into the hands of all of our users in just a few clicks** to accurately identify trends, pinpoint areas that need improvement/intervention, and serve as a means to build relationships with students.

**Our Vision:**

*Through the use of the BIE software, people, relationships, and information will come together to strategically create the best solutions for managing enrollment.*
BI at SRU – Applied to Enrollment-Related Functions
“Building a Culture of Performance”

- Provide flexible, ad hoc (anytime) reporting & analysis at the operational & trend levels
- Simplify operational reporting to eliminate a flood of print data reports
- Extract select longitudinal data to provide a foundation for trend analysis (2002)
- Develop data models around key institutional metrics
- Align service/intervention redesign strategies with key performance indicators
- Provide scorecards/dashboards for monitoring key performance indicators at the institutional & department levels
- Guide a “enrollment council” in creating open access and evidence for driving institutional performance and planning
Enrollment Portal Benefits

- Transform our once static enrollment reporting environment to a dynamic and fluid solution by providing enrollment data through an web-based environment.
- Leverage the data in our existing systems and combine data sources to view, customize, and create data reports which are located in one place.
- Place enrollment information for decision-making on every desktop.
- Understand the past, monitor the present, and predict outcomes.
- Improve decision making with up-to-date data you can trust.

- Gain a holistic view of the enterprise with data aggregated from across the institution, regardless of the location or systems used.
- Intervene and modify enrollment strategies to ensure strategic goals are met.
- Harness the power of advanced analytics to glean greater value from the information to solve business challenges.
- Improve planning by identifying trends and taking actions earlier.
- Offer secure information access to users.
Meeting the needs of different individuals -

Enrollment Portal Views:

- President/Provost/Vice President Level
  (Overall Strategy Detail - 5,000 ft view)

- Dean/Chair Level (4 Views - 1 view for each college)
  (Customized to College - Mid-Level Detail for College Specific Areas - 2,000 ft view)

- Enrollment Services Team/Institutional Research View
  (High Detail/High Analytics - 0 foot view - Front Line)

- General View - All Faculty/Student Life
  (Customized for General Overview of Enrollment & Department Applications)

- Drill Through View
  (High detail for analysis and student communications)

Placing information for decision-making on every desktop -

Making the information specific to the user and providing a launch pad to more detail
What happened?
How many, how often, where?

Why is this happening?
What actions are needed?

Where exactly is the change?

What if these trends continue?

Data
Information
Knowledge
Intelligence
Wisdom

Optimization

Predictive Modeling

Forecasting
Two major outcomes have resulted from the use of the business intelligence application:

- First, we are managing enrollment across the institution to ensure a single, comprehensive view of relationships and data across departments, functions and institutional systems.
- Second, information is now communicated across various departments in an effort to inform key constituencies and collaborate on effective measures of decision-making.

The portal unites data from all sources and locations so that everyone from the president to department chairs are working with the same data, viewing identical information against the most current criteria for success.
What information is necessary to make well-informed decisions (undergraduate & graduate enrollment funnel activity; conversion and yield rates; breakouts on ethnicity, regional, out-of-state and international students) on our new enrollment condition?

**Easy Access to Reports**

Reports are Refreshed Daily

**Report Questions:**

- “What information is necessary to make well-informed decisions (undergraduate & graduate enrollment funnel activity; conversion and yield rates; breakouts on ethnicity, regional, out-of-state and international students) on our new enrollment condition?”
Report Questions:

- “Are applications, offers, & deposits up as compared to the same time last year?”
- “How does the offer rate compare to the same time last year and previous years?”
- “How should our waitlist strategies be changed due to the increase in applications?”
- “What impact is the increase in denials having on our communications and time?”

### Fall Freshman and Transfer (AOD) New Enrollment

<table>
<thead>
<tr>
<th>Applicant Type</th>
<th>Full Time</th>
<th>Summer/Fall</th>
<th>2011</th>
<th>2012</th>
<th>Year-to-date for 2012</th>
<th>Year-to-date for 2013</th>
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<tbody>
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<td><strong>Freshman</strong></td>
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<td></td>
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<tr>
<td>Applicants</td>
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<td>6,162</td>
<td>5,109</td>
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<td>Offers</td>
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<td>2,811</td>
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<td>721</td>
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<td>Denials</td>
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<td>1,175</td>
<td>286</td>
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<td>Cancellations</td>
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<td>10</td>
<td>3</td>
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<td>1,377</td>
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<td>99.03%</td>
<td>95.84%</td>
<td>95.84%</td>
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</table>

| Transfer       |           |             |      |      |                      |                      |
| Applicants     | 1,342     | 1,260       | 336  | 331  |                      |                      |
| Offers         | 964       | 836         | 163  | 107  |                      |                      |
| Registrations  | 601       | 700         | 70   | 45   |                      |                      |
| Denials        | 46        | 19          | 4    | 5    |                      |                      |
| Cancellations  | 29        | 17          | 625  | 599  |                      |                      |
| Offers Declined| 700       | 700         | 70   | 45   |                      |                      |
| Wait List      | 8         | 1           | 210  | 270  |                      |                      |
| Applicant_to_Offer_Rate | 66.35% | 46.38% | 28.08% | 20.08% |                      |                      |
| Offer_to_Deposit_Rate | 45.85% | 45.17% | 26.60% | 25.41% |                      |                      |
| Deposit_to_Registered_Rate | 95.84% | 97.86% | 95.84% | 95.84% |                      |                      |

| Total          |           |             |      |      |                      |                      |
| Applicants     | 7,713     | 7,422       | 6,445| 5,931|                      |                      |
| Offers         | 5,905     | 5,741       | 4,084| 3,770|                      |                      |
| Registrations  | 2,146     | 2,070       | 791  | 714  |                      |                      |
| Denials        | 502       | 488         | 195  | 195  |                      |                      |
| Cancellations  | 58        | 50          | 10   | 8    |                      |                      |
| Offers Declined| 1,342     | 1,260       | 336  | 331  |                      |                      |
| Wait List      | 89        | 17          | 625  | 599  |                      |                      |
| Applicant_to_Offer_Rate | 63.52% | 64.01% | 54.00% | 56.19% |                      |                      |
| Offer_to_Deposit_Rate | 44.58% | 45.17% | 26.60% | 25.41% |                      |                      |
| Deposit_to_Registered_Rate | 96.34% | 97.86% | 95.84% | 95.84% |                      |                      |
Report Questions:

- “Are applications, offers, & deposits up for first year and transfer students as compared to the same time last year for BISS, EDUC, HES, AND HFPA?”

- “How does the offer rate compare to the same time last year and previous years for BISS, EDUC, HES, and HFPA?”

- “How many of our incoming students are entering with an interest in Physical Therapy?” “What are their majors?”

- “How can academic departments build their relationships with offers, deposits, and registered incoming students?”

- “Are applications, offers, and acknowledgements up for graduate students?”

- “Are applications, offers, and acknowledgements up in our web-based graduate programs?”

- “What trends are evidenced for growth in academic programs and how can this information be used to inform academic facility needs and course planning needs?”
Report Questions:

• “Are applications, offers, & deposits up for first year and transfer students as compared to the same time last year for BISS, EDUC, HES, AND HFPA?”

• “How does the offer rate compare to the same time last year and previous years for BISS, EDUC, HES, and HFPA?”

• “How many of our incoming students are entering with an interest in Physical Therapy?” “What are their majors?”

• “How can academic departments build their relationships with offers, deposits, and registered incoming students?”

• “Are applications, offers, and acknowledgements up for graduate students?”

• “Are applications, offers, and acknowledgements up in our web-based graduate programs?”

• “Where are the increases in enrollment occurring so that course planning and faculty complement can be addressed?”

Informational Streaming “How to” Videos
A Overview of BI Applications at SRU

**Reporting and Analytics**
- New enrollment planning for FR, TR, and graduate
- Ethnicity, Gender, Region, State, County, High School, College, Department, and Major, Pre-professional program
- Segmentation
- New enrollment by funnel activity
- New enrollment by quality
- Registration by headcount, credit hours, FTE by undergraduate, graduate, new students, class levels, full/part time status, special admits status
- Course Planning: Advisement and scheduling information by master course schedule and liberal studies

**Contacts/Interventions**
- New Admits/Offers, Deposits, Registered Students
- Orientation participation
- First year students at mid-term and final grading for retention and advisors
- Advisor & Academic Departments with majors, 2nd majors, and minors
- Advisor lists and No Advisor lists
- Department applications by major, minor, 2nd major, specializations, & class levels
- Department applications by major counts and class level counts
- Department applications by class lists with contact information
Important Data and Information Useful to EM

- Market share, market penetration, and (awareness) information (success relative to peers and competitors)
- Census and population projection information
- Current and prospective student profile and academic program trend data
- Competitor information (National Clearinghouse, College Board Admitted Student Survey, College Board Enrollment Planning Service)
- High school graduation rates and college-going rates
- Institutional data on space availability and program capacity

What other data and information is meaningful to the recruitment process???
Planning for Optimum Enrollment

- New first year students/New transfer students/New Post-Bac students/New Graduate Students/
- Resident/Nonresident
- Local/Regional/Out-of-state
- Major feeder high schools or community colleges or other colleges & universities
- Minority/majority/specific ethnic groups
- Academic ability groups
- Pell eligible or expected family contribution (EFC) ranges
- First Generation
- Gender
- Choice of major
- Type of first contact/source codes
- New first year students with college credit
- Transfer students (FR, SO, JR, SN)
- Post-Bac
- Non-Degree
- Graduate (FT and PT – Online & Traditional – SRU, Feeder Institutions, Workplace)
- Enrollment by term, intersession, and summer

What other indices are important to our enrollment planning efforts?
Additional Data Sources

- Unit level data
- Housing Request Comparisons
- Caseload/Staffing levels
- Productivity and efficiency
- Space utilization
- Satisfaction with services
- Personnel evaluations
- Budget analysis
- Utilization of services
- Facility maintenance
- Operating resources
- Outcomes assessment
- Student satisfaction
- and many many more…
Making better decisions with access to higher-quality readily available data that informs routine decisions and long-range strategic planning
Building a Strong Information Environment

- DegreeWorks Degree Audit
- Banner Student Information System SIS
- Banner Relationship Management BRM
- LUMINIS PORTAL MySRU
- COGNOS REPORTING
- ORACLE

Ellucian
EDW Overview

Information Model

- Information needs to reach all levels of campus
- Data from lower levels must be transformed to upper levels
- Refined focus on supporting the actual business processes

Performance Management

EXECUTIVES:
Need visibility into progress towards our goals, objectives
“Am I achieving my goals?”

MANAGEMENT:
Need timely trends, summaries, analytics of our operations
“How am I doing?”

KNOWLEDGE WORKERS:
Need to analyze trends and root causes
“Why is this happening?”

STAFF:
Need detailed reports in many formats and ad-hoc access
“What is going on?”
“What do I need to do?”

Enterprise Data Warehouse

Trend, summary data

Performance data

Operational Data Store

Detailed data
Development of SRU’s Reporting Environment

**EDW Overview**
**BPRA Data Warehouse Solution**

- **Ensures Consistent Reporting Results**
  - Common Data Source
  - Common Business Concepts

- **Operational Data Store (ODS):** Ad-hoc querying and daily reporting
- **Enterprise Data Warehouse:** Historic, trend reporting and analytics

![Diagram of EDW Architecture]

- **Data Snapshots Based on Dates and Events**
- **Data Sets ‘Frozen’ for Point in Time**
- **Historic, Trend Reporting**
- **Analytics**
- **One Set of Data**
- **Data Changes Daily**
- **Daily Reporting**
EDW Overview
Performance Reporting and Analytics Architecture

- Operational Data Store
  - Common Data Model
  - Denormalized Structures
- Operational Data Store
- ETL
- Enterprise Data Warehouse
  - Enterprise Star Schemas
  - OLAP Tools
- Reporting Tools
- Reporting Tools
- Multi-Dimensional Analysis

Performance Management
- Digital Dashboard
- Enrollment Funnel
- Analytical Applications
  - Business Intelligent Channels
What type of report is provided from the ODS environment?
What type report is produced from the EDW environment?
Survey Assessments

SURVEY Assessment Outcomes

Open Communication and Ease of Use by Others
Transparency and Accountability
Web-Site Development- Transparency & Accountability

http://administration.sru.edu/publicrelations/accountability/accountabilityreport.htm

Co-created institutional profile accountability student profile website with PR and IR as a result of the FOE recommendations
Developed with IR NSSE presentations and reporting as a result of FOE recommendations