

# *Bringing SEM to Life: Enrolment Planning and the SEM Framework*

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SEM Summit 2017 – Ottawa, Ontario



# Overview of Session

1. The SEM Planning Framework
2. What has worked, not worked?
3. Review of the Results from the SEM Readiness Survey
4. World Café Interactive Session – Looking through the SEM Lens – 10 years of Best Practices
5. Wrap-up



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## So Why SEM?

**Higher education in North America faces real challenges today:**

- Achieving viable program mix to a) serve students, b) meet goals, and c) respond to the realities of our own institution.
- An increase in underprepared students, first generation students – or now our “new majority.”
- Change “issues” – change management.
- Budget cuts; increased access to student support.
- Need for more student engagement opportunities.
- **You can name more - Facilities, space availability, scheduling, etc...**



## What to do?

### **Enter SEM!**

- Strategic and intentional
- Practical, tangible planning process
- Data- and goal-driven
- Action-oriented
- Cross-campus participation
- Rallying point for the campus
- Student success focused
- And so much more . . .



# SEM Defined

- Strategic Enrollment Management is a **concept** and **process** that enables the fulfillment of institutional **mission** and **students' educational goals**.

~ Bob Bontrager

- 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 Defined

### **What SEM is not:**

- A quick fix or silver bullet
- An enhanced admission and marketing operation
- A recruiting plan
- An administrative function separate from the academic mission
- Solely about the organizational structure of the institution
- Solely about growth
- A financial drain on the institutional budget
- An overnight process



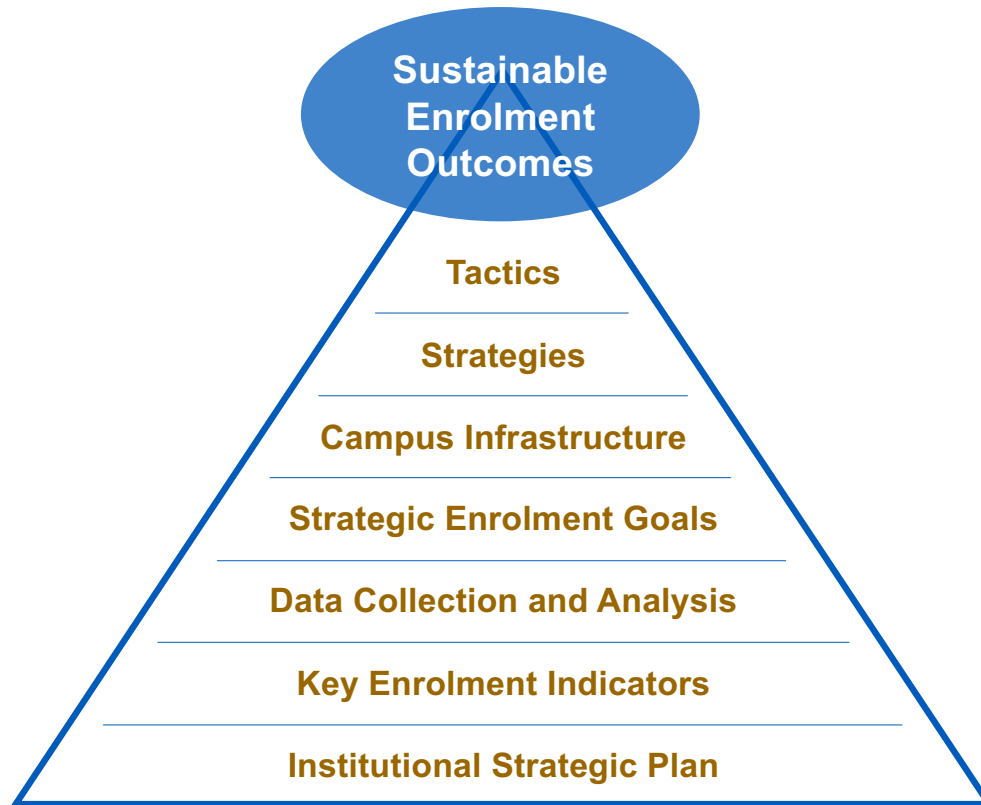
## SEM Defined

### The purposes of SEM are achieved by:

- Establishing clear **goals** for the number and types of students needed to fulfill the institutional mission.
- Promoting **students' academic success** by improving access, transition, persistence, and graduation.
- Promoting institutional success by enabling effective **strategic and financial planning**
- Creating a **data-rich environment** to inform decisions and evaluate strategies.
- Improving process, organizational and financial **efficiency**, and outcomes.
- Strengthening **communications and collaboration** across the campus—especially between enrolment managers and instruction.



# SEM Planning Framework



*Bontrager/Green*



# SEM Planning Framework



# SEM Planning Framework



- **Student categories:** first year, transfer, graduate, certificate, continuing ed, face-to-face/online, etc.
- **Desired student groups:** racial/ethnic diversity, academic ability, special skills, family income
- **Geographic origin:** local, regional, national, international
- **Recruitment, retention, completion rates**
- **Institutional capacity**

# SEM Planning Framework



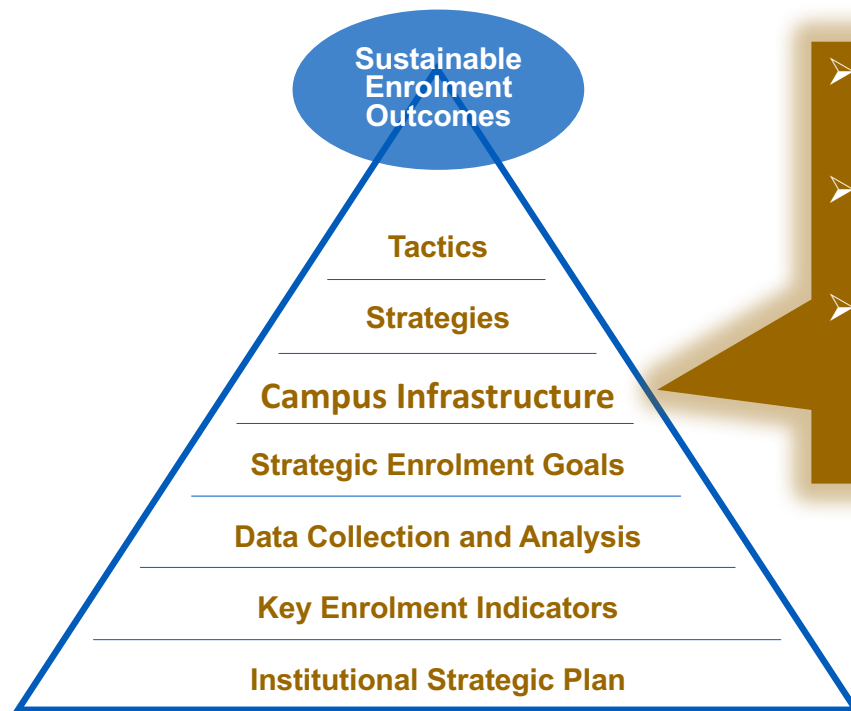
# SEM Model: Data

- “Count everything that moves!”  
--Old SEM Proverb
- “Track relentlessly what works and what doesn’t.”  
--Slippery Rock University
- “Data is not the plural of anecdote.”  
--Scannell & Kurz
- “Without Data you’re just another person with an opinion.”  
--Unknown

# SEM Planning Framework



# SEM Planning Framework



- **Staffing:** skill sets, strategic deployment and structure
- **Systems:** policies, procedures, technology
- **Capacity for making effective enrolment decisions :** positions, reporting lines, committees

# SEM Planning Framework



- Increase new students of specified types
- Increase retention rates, specifically by student types
- Expand into new markets
- Utilize emerging technologies
- Financial aid/scholarships
- Academic programs: mix and delivery systems

# SEM Model: Strategies & Tactics

## There is a Difference:

- Enrolment Goals = Big picture; driven by campus leadership team
- Strategies = Driven by leadership and developed by Faculties and Service units
- Tactics = How you get there; driven by affected department





## SEM Model: Strategies & Tactics

**Enrolment Goal/Target:** Increase transfer student enrolment to 4%.

**Strategy:** Ensure timely and accurate program information that is easily accessible to transfer students and ensure seamless transfer of courses to a variety of program offerings through block and course to course transfer.

**Tactic(s):** Academic departments will create block transfer agreements with institutions that share a common programmatic approach in a subject area. Recruitment and marketing will promote transfer opportunities widely across the sector. OREG will streamline the transfer credit evaluation process through improving automated systems. Advising units will deploy degree audit software that enables students to plan courses in advance of actual register (includes transfer credit recognition) so that transfer is a seamless registration process.



# SEM Planning Framework



# The SEM Framework

Two institutional perspectives:

- How has the SEM Framework been a useful planning tool?
- What has worked, what is challenging?
- Has SEM helped to drive budgets/budget models/budget allocations and if so, how?
- Are there any other emerging drivers?

# Results from SEM Readiness Survey



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## OBJECTIVE 1

Align institutional strategic plan with broad enrollment targets and desired mix of students.

## EVIDENCE OF SUCCESS

- Clarity of unit/program within institutional mission  
43% reported good/excellent.

## OBJECTIVE 2

**Achieve an institutional culture of partnership and collaboration, including leadership, participation and buy-in.**

### EVIDENCE OF SUCCESS

- Academic colleges/faculties and departments  
30% reported good or excellent.
- Student unions and organizations  
25% reported good or excellent.



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## OBJECTIVE 3

**Establish clear 5 to 10-year Key Enrollment Indicator (KEI) targets for the number and types of students needed to fulfill the institutional mission.**

## EVIDENCE OF SUCCESS

- Desired student groups: racial/ethnic diversity, academic ability/quality, 1st generation  
11% reported good or excellent.
- Learning modality (on-line, blended learning, experiential ed)  
16% reported good or excellent.

## OBJECTIVE 4

# Create a data-rich environment to inform decisions and evaluate strategies.

## EVIDENCE OF SUCCESS

- Providing designated reports using consistent formats and definitions on an established production schedule to campus and executive leadership  
29% reported good or excellent.
- Use data results to establish focused goals for recruitment, retention, service, *etc...* and enrollment projection models  
16% reported good or excellent.



## OBJECTIVE 5

**Develop an enrollment infrastructure sufficient to achieve enrollment targets.**

### EVIDENCE OF SUCCESS

- Accountability and metrics for achieving SEM goals  
26% reported good or excellent.



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## OBJECTIVE 6

**Enable effective financial planning and generate added net revenue for the institution.**

### EVIDENCE OF SUCCESS

- Budget planning is coordinated and strategically allocated to support short-term and long-range enrollment goals  
26% reported good or excellent.



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## OBJECTIVE 7

**Develop strategies for achieving KEI targets and enhancing a successful student admissions funnel system that effectively and efficiently moves a student from prospective status seamlessly to a confirmed enrollment.**

## EVIDENCE OF SUCCESS

- Increase retention rates, specifically by student types  
13% reported good or excellent.
- Improve service levels to all stakeholders (e.g., prospective and current students, other institutional departments, other institutions, coordinating agencies)  
20% reported good or excellent.

## OBJECTIVE 8

**Implement action steps/tactics for implementing enrollment-related strategies.**

## EVIDENCE OF SUCCESS

- Implement/support a CRM system  
26% reported good or excellent.
- Use of electronic/virtual student services and technology to support related internal business processes  
23% reported good or excellent.



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## OBJECTIVE 9

### **Achieve sustainable institutional SEM.**

## EVIDENCE OF SUCCESS

- Ensuring use of an institutional SEM plan, which includes an ongoing review and assessment process, for determining, achieving, and maintaining optimum enrollment over the long term  
26% reported good or excellent.
- Enabling effective campus-wide planning  
33% reported good or excellent.



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# World Café – The SEM Lens – Best Practices over past 10 years

Instructions – Divide into groups, and based on the Objectives from the SEM Readiness Survey, discuss at least 3 objectives from the perspective of:

- Barriers to achieving success for each objective
- Strategies to achieve success for each objective

By sharing our collective successes and challenges, we can help each other to improve institutional approaches that will help us to reach greater student success.



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# Wrap-up

Thank you for your participation



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