

## 1. Objective: Align institutional strategic plan with broad enrollment targets and desired mix of students.

*FOCUS: Clarity of unit/program within institutional mission*

### **Barriers:**

1. Data – lack of data
2. Enrolment planning now linked to Strategic Plan
3. Culture
4. Lack of clarity around institutional plan (varies) → revolving doors in leadership
5. Lack of integration and different plans (eg. SMA, SEM ...)
6. Lack of clarity around respective roles of units
7. Transition phase in different plans can cause confusion – need to be on same track
8. Sequence: Academic Plan → SEM Plan → enrolment targets
9. Bandwidth
10. In developing a plan, there is not always an academic / enrolment perspective at the table (right people at the table)
11. Lack of awareness of what SEM is, articulating the value within your unit (institution)
12. Lack of rubrics for determining relevance of program within institution – do we talk about the lifecycle of a program?
13. Strategic priorities compete with others

### **Strategies:**

1. Enrolment Data working group
2. Link Enrolment targets with Strategic Plan
3. Consult across the institution
4. Team meeting – integrated cross-campus leaders – with clear roles
5. Collaborative leadership reflects nature of institutions

6. Share information and data
7. Consistency in how we formulate and define data, e.g. What is FTE
8. Dean of Program Development to support → BCIT
9. Cross-institutional group
10. Ensuring there is broad representation, representatives from the SEM committee are present
11. Be prepared with best practice research, using a change management strategy
12. Develop a rubric and build discussion into program review process
13. Reconcile competing priorities
14. SEM Plan brings knowledge back to STRAP which is then fed back to SEM

## 2. Objective: Achieve an institutional culture of partnership and collaboration, including leadership, participation and buy-in.

*FOCUS: Academic colleges/faculties and departments*

### **Barriers:**

1. Come to this with different “lens”
2. Cynicism – this is “just another plan” that will dilute quality of students
3. Way organizations are structured creates silos/barriers
4. Operational goals/practices conflict with SEM
5. Model for goal setting not siloed/simultaneous and not formalized
6. Clear understanding of overall goals through an institutional lens
7. Senior Executive Champion – not just one person
8. Program succession plans
9. Role clarity of SEM leadership not present nor are those across the organization
10. Employees’ judgement of our institution
11. Lack of clear ownership

### **Strategies:**

1. Retreat involving everyone around the same table (Student Services, faculty, students) around a SEM topic
2. Focus conversation on shared goal rather than divisional language.
3. Embedding SEM into budgeting
4. Policy review to support SEM – gatekeeping vs moving students along
5. Collaboratively develop goals (sharing for consistency/cascading)
6. Institutional representation
7. Open and ongoing communication (roadshow)

8. Data driven
9. Clarify roles of SEM leadership and all SEM participants across the organization
10. Engage employees to be genuine ambassadors for their institution
11. Integration and accountability

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

*FOCUS: Desired student groups: racial/ethnic diversity, academic ability/quality, 1<sup>st</sup> generation Learning modality (online, blended learning, experiential education)*

#### **Barriers:**

1. Racial/ethnic diversity – identifying these groups strategically and respectfully (human rights)
2. External factors that can change mid-stream
3. Access to university-preparedness: historical/cultural/economic/social barriers
4. Retention and completion rates vary hugely by different groups
5. Funding
6. One-stop approach/single-story message that doesn't engage students
7. Establishing a common language in what are Key Enrolment Indicators (definitions)
8. Discomfort in asking for personal information, and how will it be used
9. Setting priorities for what data is important (too much data)
10. Senior admin/academics' understanding of why to collect the data
11. Privacy/data

#### **Strategies:**

1. Data collection and analysis
2. Connect data collected in different places
3. Data/information to identify those needing support – encourage students to declare
4. Remove stigma of self-identifying
5. Training for deeper understanding of diversity of students prior to entering university
6. Funding equity

7. Create strategies that are relevant to communities/compliant – engage with involved community to ensure planning is reflective of their needs
8. Transparency in how the data will be used; when is the data being collected
9. Implement activity-based budgeting to incent units to participate in the process
10. Take a critical approach to what is needed for KEIs based on institutional plans/mission
11. Develop targets that are transparent

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

*FOCUS: Providing designated reports using consistent formats and definitions on an established production schedule to campus and executive leadership*

### **Barriers:**

1. Common understand of language
2. Non-alignment between IR and other units
3. Non-contextualized data
4. No one size fits all solutions
5. Lack of data and information tools
6. Data governance policies
7. Technology to support easy analysis
8. Lack of infrastructure to deliver analysis
9. No dedicated IR resources
10. Ownership – who owns the format of the report; and the portal of data
11. Trust in the data; source and validity of that data
12. Resources – time too long for IT to create reports
13. Technology adoption – willingness to use/data governance
14. Data availability/quality
15. Data definitions – consistency across institution; what is student success – retention
16. Which area of the institution is the lead on data?
17. Interpretation of data → context, communication

**Strategies:**

1. Recognition of value of data across campus; understand business processes
2. Acquire data and information tools
3. Integrate data early on
4. Enrolment data group – issues → questions → IR answers
5. Develop the capacity within the organization
6. Transparency of definitions and parameters; what “defines” a data group or classification
7. Building champions within units
8. Leadership buy-in → implementation/ownership
9. Willingness to change
10. Data governance committee establishment – get to a single source of truth
11. Easy to understand self-serve function when pulling data
12. Training
13. Consistent data definitions



## 5. Objective: Develop an enrollment infrastructure sufficient to achieve enrollment targets.

*FOCUS: Accountability and metrics for achieving SEM goals*

### **Barriers:**

1. Loose goals, poor stakeholder buy-in
2. Data located in diverse areas, lack of focussed expertise to collect data
3. Too much/not enough data available, not connected with goals
4. Silos – everyone cares only about their area of focus
5. Lack of awareness as to how enrolment targets impact the rest of institution
6. Not having all departments engaged in plan
7. Lack of promotion of programs offered
8. Unclear roles/responsibilities for decision making for SEM Plan

### **Strategies:**

1. Conduct gap analysis – what have, what don't (resources, reports, etc.)
2. Establish clear goals from outset, include stakeholders
3. Clear metrics – right data for right decisions, how to interpret data
4. Prioritize data required to inform decision/goals
5. Strong leadership can set the tone and culture
6. Communicate the needs to institution (inclusive and collaborative)
7. Develop the true cost of an FTE to institution
8. Regular meetings, communication is campus wide

## 6. Objective: Enable effective financial planning and generate added net revenue for the institution.

### Barriers:

1. Enrolment planning with no consideration for budgetary allocations
2. Emotional ties to programs not financially viable
3. Ongoing monitoring/revision of plan
4. Lack of understanding of interconnectedness by enrolment and financial planning
5. Understanding of budget implications on programs
6. Inability to clearly articulate goal alignment to strategy has further impact of not being approved/support
7. Funding formula
8. Program caps
9. Retention
10. Not having a strategy/reactionary
11. Demographic shift
12. Meeting needs of students with mental health concerns and accessible learning accommodations

### Strategies:

1. Integrated coordinated approach to SEM planning and financial implications (e.g. programs with high WFUs vs programs with low financial yields)
2. Determine metrics and align to institutional values, e.g. will the institution offer at breakeven or less? Opportunities for financial support
3. Periodic reviews and willingness to adjust numbers
4. Educating across the institution
5. Focus on retention (e.g. Alberta economy)
6. Develop grid for determining goal/financial allocation

7. Alternative sources of funding – benefactors, more international students
8. Create own placements, lab space – allocate a number of seats to indigenous students
9. Early warning strategies, increase support in first 90 days
10. Activity-based budget (curriculum development, curriculum design)
11. KPI financial “health” of program (institution wide)
12. Retaining enrolment by connecting/policy/service supports/procedures, aligning to reach out to and support such students [learning accommodations]

## 7. Objective: 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.

### Barriers:

1. Financial
2. Mix:
  - a. student mix/profile
  - b. program mix/type
3. Government policy
4. Do not read emails if bombarded with too much
5. Not knowing who you want to target
6. Insufficient data: do you have good data on program by retention to target programs with low retention? Is it beyond program analytical data, is it a course/ location/ faculty member impacting low retention?
7. Efficiency and efficacy of communication with prospective students
8. Lack of data, perceived privacy constraints
9. Lack of information on what student needs to be successful – by type of students
10. Traditional data collection methods may not be effective for all types of student

### Strategies:

1. Work with candidates/students early and personally
2. Communication strategies – from prospect to graduate – consistent messages
3. Establish desired student mix – actively target them; focus throughout the registration process
4. Data mine – who are we converting? Are they who we thought?
5. Celebrate and grow areas of strength, where high retention exists
6. Collect data on demographics, goals and expectations (marketing data)

7. Specific offers to support \_\_\_\_\_ students; comprehensive support
8. Develop \_\_\_\_\_ of student success and measure

## 8. Objective: Implement action steps/tactics for implementing enrollment-related strategies.

### Barriers:

1. SIS
2. IT resources
3. Different CRM systems not integrated with each other therefore not a lot of data/metrics available
4. Lack of clear objectives for CRM prior to implementing a system
5. Change management re: move from old/comfortable systems/processes
6. Size and complexity of CRM project – so many different groups with different needs; challenge to implementing – how to prioritize
7. Institutional agreement on what are the important KEIs
8. Selecting and implementing a system that is robust/flexible enough to respond to future needs (not just what we need today)
9. Institutional buy-in on the use/approach to a CRM
10. Lack of dedicated implementation team – ROI
11. Lack of ongoing development teams e.g. degree audit

### Strategies:

1. A new state-of-the-art SIS – modern technology; integrated; cloud-based
2. Cross-department/faculty commitment to using one shared system
3. Develop a prioritization strategy for IT and other resources
4. IT governance structure
5. Full cost consideration beyond system/software costs to avoid future sticker shock
6. Prioritize – discipline around scope of project – step by step
7. Environmental scan of data use to be able to compare/contrast

8. Campus-wide consultation/buy-in on use/design/selection of CRM system
9. Create dedicated implementation team with enough to adequately implement
10. Monitoring strategic committee, crossfunctional

## 9. Objective: Achieve sustainable institutional SEM.

### Barriers:

1. Functional org charts
2. Resource allocation model (no consequences)
3. Fuzzy goals
4. Institutional buy-in → support units (e.g. Finance, IT), academic buy-in
5. Demonstrating ROI
6. Functional org chart – bi-council systems/ divided/ separate identity/ vested/ TEC talk
7. Resource allocation/ \_\_\_\_\_
8. Fuzzy goals/no failures /short term?
9. Institution not unified
10. Public policy schism in PSE
11. Finding time to do it; not understanding what SEM can do as institution
12. Academic – bridging programs/models of delivery; planning done separately
13. Identity of institution → then reflecting it in planning
14. Silos and communication
15. Sometimes takes a real enrolment crisis
16. Planning capacity of the institutions – so many plans competing for time, or there is plan paralysis
17. Accountability to achieve
18. Buy-in from senior leadership and an organic adaptation from functional areas

### Strategies:

1. Cross-functional teams
2. Shared resource models



3. Open data
4. “SEM updates”; communication strategies; going to college council; conversations about what is important to us – institutional mission
5. (see 9. 2<sup>nd</sup> sheet group 1)
6. As above
7. As above
8. Make it a priority – get people to understand what it means – getting students to tell their stories; get SEM to be integrated into everything you do
9. Connecting enrolment plan infrastructure with academic planning
10. Enrol contracts with strategies outcomes
11. Socialize the objective of the process – lots of presentations – builds engagement, buy-in, builds confidence in the planning leadership
12. Follow-up, celebrate, create touch points, keep going back to it
13. Have president/provost built into Strategic academic plan as institution’s guiding document