

Core Concepts and Applications of Strategic Enrollment Management (SEM)

OACRAO Workshop

August 2, 2017

Tom Green and Jim Bouse

Workshop Overview

- 1. Introductions
- 2. SEM Core Concepts
- 3. Pressures facing higher education today
- 4. Responses to pressures
- 5. Questions and discussion





Introductions: What do you want to learn from this workshop?



SEM Core Concepts

What is Strategic Enrollment Management (SEM)?

Strategic enrollment management is a concept and process that enables the fulfillment of institutional mission and students' educational goals.

Bontrager



The Purposes of SEM are Achieved by...

- 1. Establishing clear goals for the number and types of students needed to fulfill the institutional mission
- 2. Promoting students' academic success by improving access, transition, persistence, and graduation
- 3. Promoting institutional success by enabling effective strategic and financial planning
- 4. Creating a data-rich environment to inform decisions and evaluate strategies

Bontrager



The Purposes of SEM are Achieved by...

- 5. Improving process, organizational and financial efficiency and outcomes
- 6. Strengthening communications and marketing with internal and external stakeholders
- 7. Increasing collaboration among departments across the campus to support the enrollment program

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Sustainable Enrollment Outcomes

Tactics

Strategies

Enrollment Infrastructure

Strategic Enrollment Goals

Data Collection and Analysis

Key Enrollment Indicators

Institutional Strategic Plan

Bontrager/Green



Sustainable Enrollment Outcomes

Tactics

Strategies

Enrollment Infrastructure

Strategic Enrollment Goals

Data Collection and Analysis

Key Enrollment Indicators

- Clarity of institutional mission, vision, goals
- Core competencies
- Strategic direction
- Aggregate enrollment goals



Sustainable **Enrollment Outcomes Tactics Strategies Enrollment Infrastructure Strategic Enrollment Goals Data Collection and Analysis Key Enrollment Indicators Institutional Strategic Plan**

- > Student categories: first year, transfer, dual enrollment, voc/tech, continuing ed, face-to-face/online, certificate, etc.
- Desired student groups: racial/ethnic diversity, academic ability, 1st gen
- Geographic origin: local, regional,
- Recruitment, retention, completion
- Institutional capacity



Sustainable Enrollment Outcomes

Tactics

Strategies

EnrolLment Infrastructure

Strategic Enrollment Goals

Data Collection and Analysis

Key Enrollment Indicators

- ➤ Internal benchmarks: KEI numbers over the past 3-5 years
- > Environmental scan
 - Demographics
 - Economics
 - Market opportunities
 - Competition
- Institutional research plan: designated reports and production schedule



Sustainable Enrollment Outcomes

Tactics

Strategies

Enrollment Infrastructure

Strategic Enrollment Goals

Data Collection and Analysis

Key Enrollment Indicators

- > 5-10 year KEI targets
- Focus: the institution's desired future
- Based on: mission, data, and environmental scanning



Sustainable Enrollment Outcomes

Tactics

Strategies

Enrollment Infrastructure

Strategic Enrollment Goals

Data Collection and Analysis

Key Enrollment Indicators

- > Staffing: skill sets, strategic deployment
- > Systems: policies, procedures, technology
- Capacity for making effective enrollment decisions : positions, reporting lines, committees



Sustainable Enrollment Outcomes

Tactics

Strategies

Enrollment Infrastructure

Strategic enrollment Goals

Data Collection and Analysis

Key Enrollment Indicators

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





- Marketing/branding initiatives
- Academic program review
- Multilingual recruitment materials
- Targeted interventions for students in high risk courses
- Enhanced academic advising
- Streamlined admission procedures
- Purchase a new CRM system



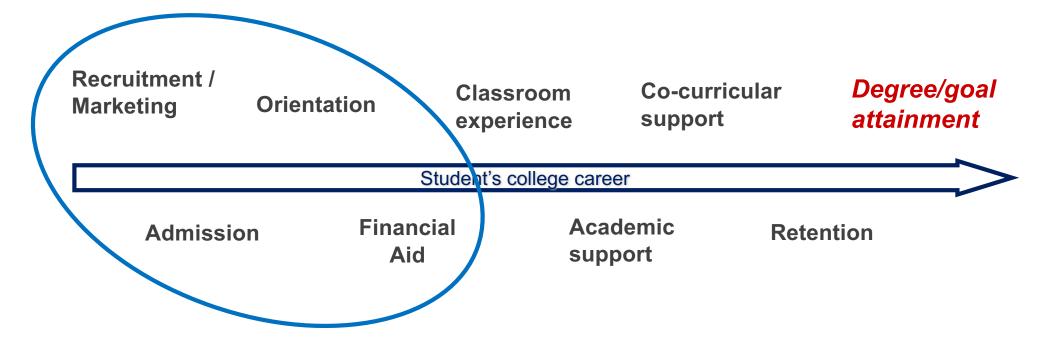
Sustainable Enrollment Outcomes Tactics Strategies Enrollment Infrastructure Strategic Enrollment Goals Data Collection and Analysis Key Enrollment Indicators Institutional Strategic Plan

- Consistently meeting goals over the long term
- Enabling more effective campus-wide planning
 - Revisions to the institutional strategic plan
 - Academic planning: curriculum, faculty needs
 - Facility planning
 - Financial planning
- Achieving the institution's desired future



Implications: Retention and Student Success

Traditional Enrollment Perspective





Implications: Retention and Student Success

- P-14 partnerships
- Outreach
- Bridge programs





Recruitment / Marketing

Orientation

Classroom experience

Co-curricular support

Degree/goal attainment

Student relationship management

Admission

Financial Aid

Academic support

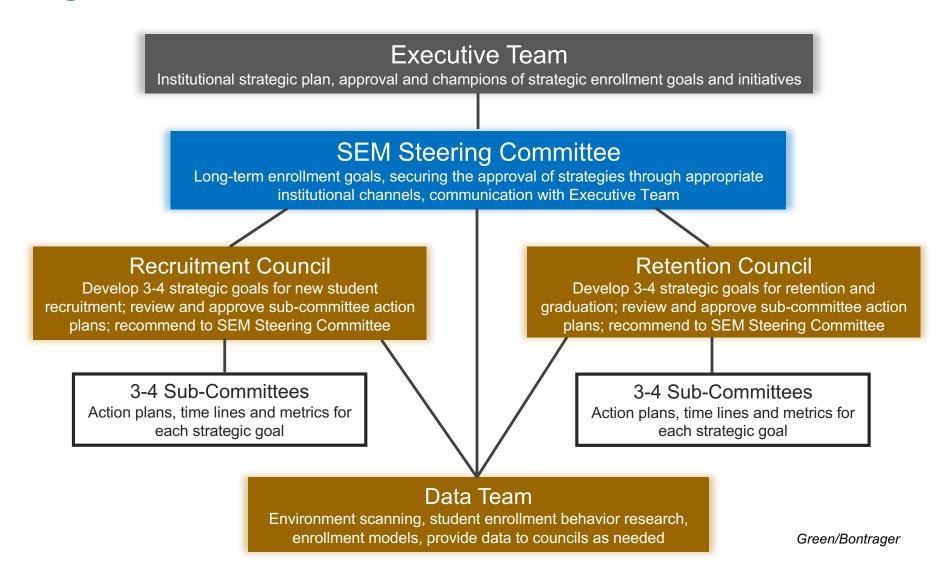




- Satisfied, engaged alumni
- Donors



Organizational framework



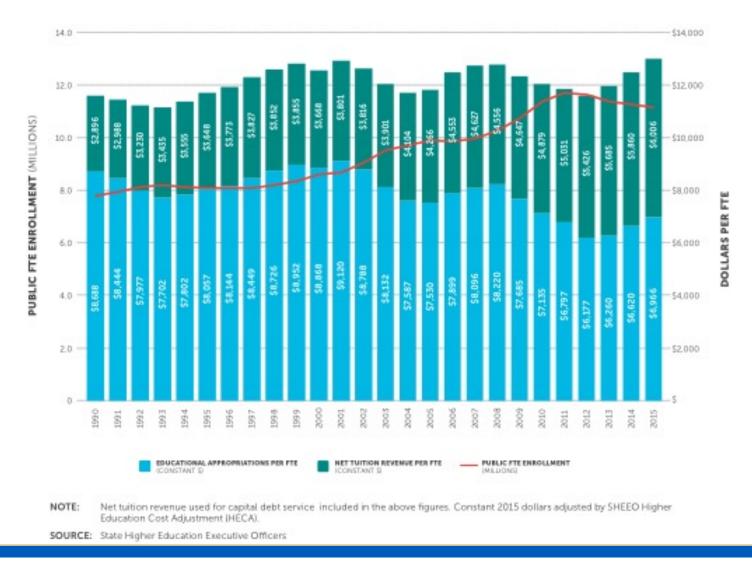




Global Enrollment Pressures

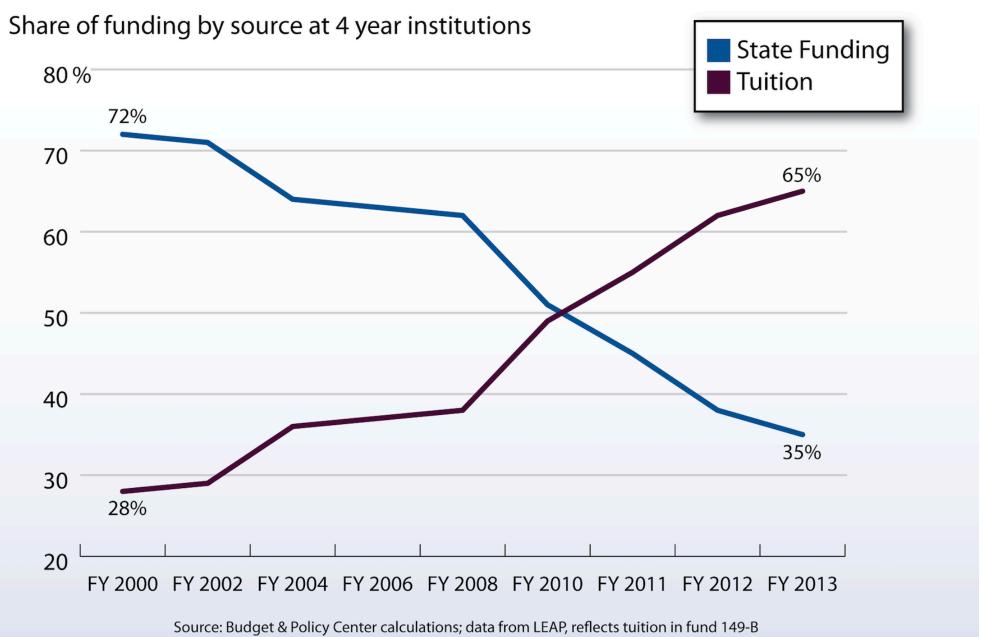
Diminishing government support for higher ed.

PUBLIC FTE ENROLLMENT AND EDUCATIONAL APPROPRIATIONS PER FTE, U.S., FY 1990-2015



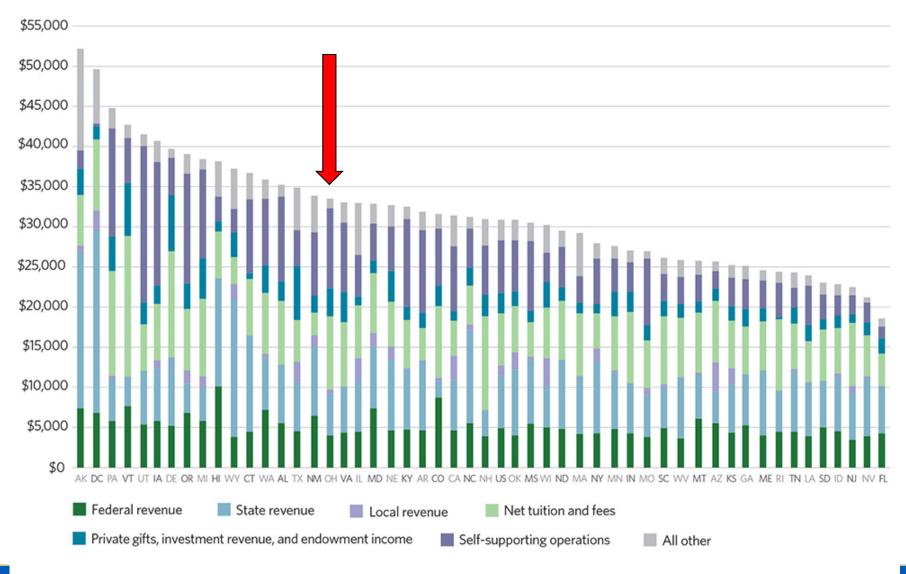


Students are Paying over Half of Higher Education Costs



Funding Sources for Public Higher Education Institutions Vary Widely Across States

Composition of revenue per full-time equivalent student, by state, fiscal year 2013

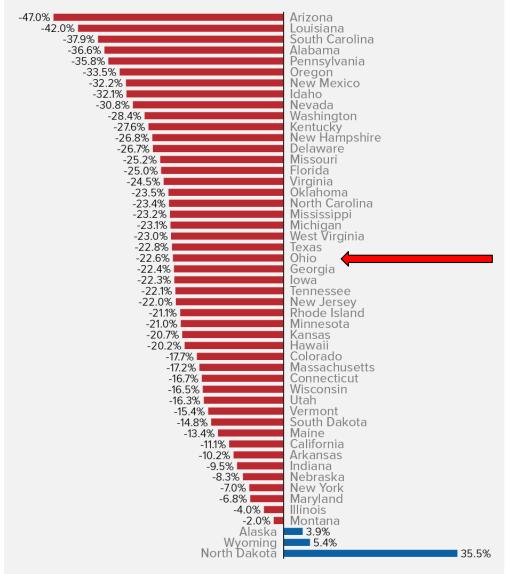




Sources: Pew's analysis of data from the U.S. Department of Education, National Center for Education Statistics' Integrated Postsecondary $oxed{A}$ Education Data System (accessed Jan. 2015)

State Funding for Higher Education Remains Far Below Pre-Recession Levels in Most States

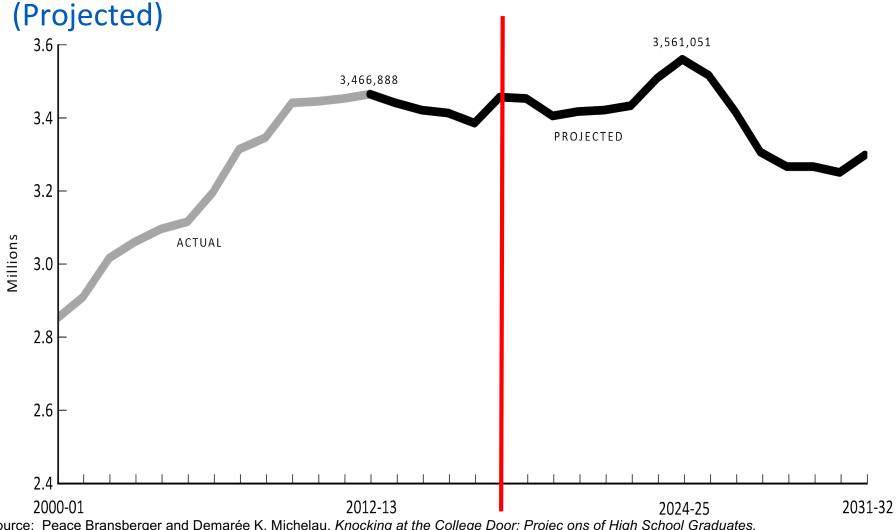
Percent change in state spending per student, inflation adjusted, 2008 - 2015

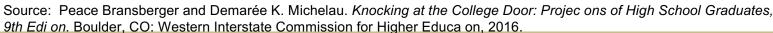






Total U.S. Public and Private High School Graduates, School Years 2000-01 to 2012-13 (Actual) through 2013-14 to 2031-32

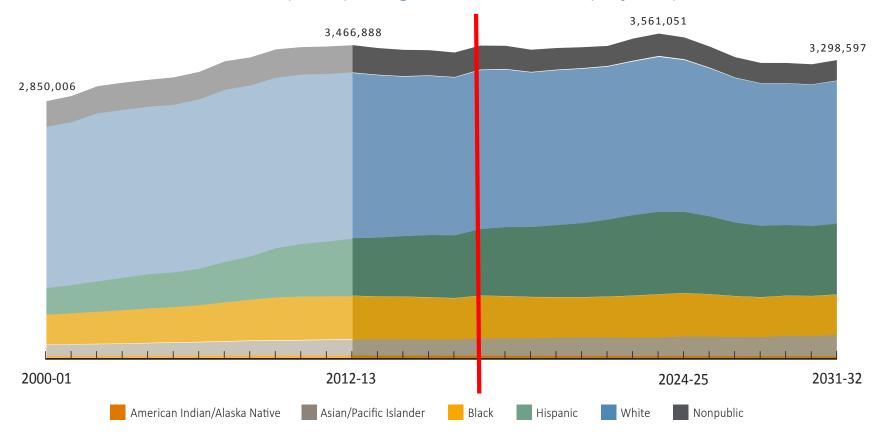






Shifting demographics

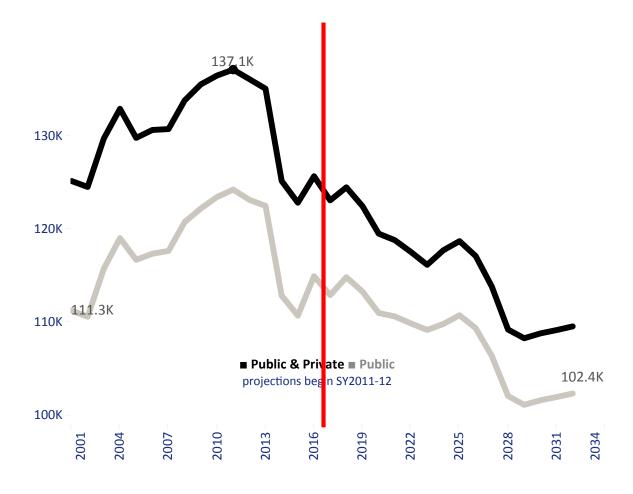
Figure 2.4. Total U.S. Public and Private High School Graduates, by Race/Ethnicity, School Years 2000-01 to 2012-13 (Actual) through 2013-14 to 2031-32 (Projected)



Source: Peace Bransberger and Demarée K. Michelau. *Knocking at the College Door: Projec ons of High School Graduates, 9th Edi on.* Boulder, CO: Western Interstate Commission for Higher Educa on, 2016.



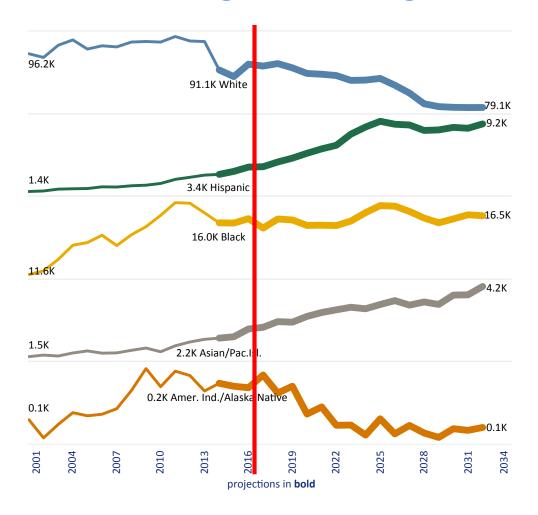
Ohio outlook for high school graduates



Source: Peace Bransberger and Demarée K. Michelau. *Knocking at the College Door: Projec ons of High School Graduates, 9th Edi on.* Boulder, CO: Western Interstate Commission for Higher Educa on, 2016.



Ohio outlook for high school graduates



Source: Peace Bransberger and Demarée K. Michelau. *Knocking at the College Door: Projec ons of High School Graduates, 9th Edi on.* Boulder, CO: Western Interstate Commission for Higher Educa on, 2016.



Increased pressure for outcomes

- 1. Performance-based funding:
 - Number of in-state graduates
 - Graduation rates
- 2. Popular perception that a degree is not worth the costs:
 - While not true, press/media report dissatisfaction with higher education
 - Pew study found 58% of Republicans think higher education is actually bad for America
- First-generation families who don't understand the portability of skills between the earned degree and the career paths of graduates





Local or National Enrollment Pressures

Rising costs of education

- 1. Higher education has long increased in costs faster than:
 - Family incomes
 - Consumer price index
- 2. Insurance, maintenance and contracts are largely outside the control of many institutions
- 3. Competition for the best facilities, services and students require investments in campus infrastructure and personnel
- 4. Technology is a multi-million dollar issue for virtually every campus:
 - Expectations are high



International enrollments

- 1. AACRAO Research has polled institutions this year at a few points to gauge the current climate across the country
 - In March 2017, 39% of institutions reported lower application levels than the prior year
- 2. Middle East applications have been hardest hit
- Individual institutions reported fears among students in large sending countries, such as China and India, that the travel ban may impact them before graduation or that they would be unwelcome at American institutions
- 4. Canadian universities are reporting increases of up to 80% in applications; Australia reports large increases, as well



Scalability of retention/graduation programs

- 1. Experiments with student transition and success programs
- 2. Some result in startling increases in retention and graduation rates
- 3. Most are difficult to scale due to the "wrap-around" nature of services
- 4. Many institutions aren't sure which initiatives are working or not working:
 - Spaghetti against the wall approach to retention and success





Responses to Pressures

Some less promising or higher-risk answers

- 1. Increased tuition discounting
- 2. Marketing in new geographic areas
- 3. Proliferation of degree programs without corresponding program review initiatives
- 4. Purchasing technology solutions with strategic plan for implementation or knowledge of how they fit into strategies
- 5. Others?



Clear value propositions

- 1. Outcomes-focus on what graduates are doing with their degrees
- 2. Statements on costs that are
 - Clear and easy to understand
 - Based upon common costs and not financial aid federal methodology and disclosure requirements
 - Linked to statements about investment
 - Linked to information on how to pay costs:
 - Federal and state aid
 - Institutional aid
 - Payment plans
- 3. Competitive advantages



Competitive advantages

- 1. Asses the institution's strength against is main competitors
- 2. Seek to communicate what the institution does well and/or is unique in its offerings
- 3. These are most effective when aligned with student choice factors



Competitive advantage questions

- 1. Who are you major competitors for applicants and admitted students?
- 2. What factors do students use when choosing a college or university?



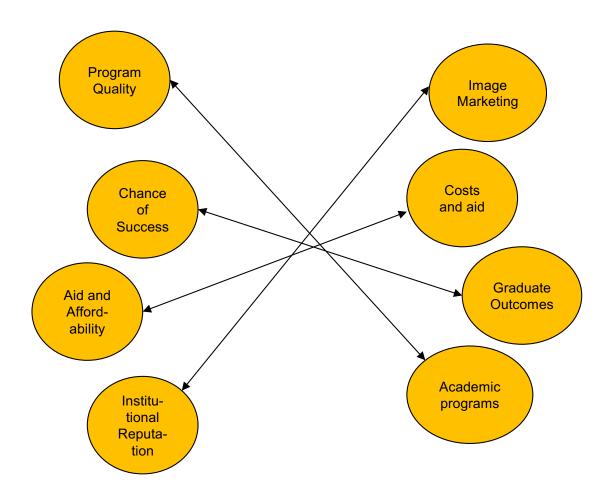
Influences and factors

Source: "Teens Talk," Chegg/Statmats White Paper, 2016.

	Total	High School Junior	High School Senior	College Student	
Offers My (Intended) Major	4.62	4.69	4.60	4.74	
Potential to Succeed at the School	4.39	4.43	4.37	4.62	
Reputation for Quality of Education	4.37	4.29	4.41	4.10	
Merit-Based Financial Aid	4.15	4.42	4.06	4.64	
The "Feel" of Being on Campus	4.09	4.00	4.13	3.79	
Cost of Tuition, Fees, Room & Board	4.05	4.16	4.00	4.31	
Need-Based Financial Aid	3.98	4.13	3.97	3.62	
Probability of Being Admitted	3.83	3.85	3.79	4.48	
Professional Preparation	3.78	3.83	3.80	3.20	
Graduates' Success	3.77	3.79	3.79	3.30	
Location	3.66	3.79	3.65	3.41	
Overall Prestige	3.62	3.79	3.60	3.30	
Size of Enrollment	3.42	3.37	3.45	3.19	
Acceptance of Transfer Credits	3.35	3.75	3.23	3.53	
Social Life	3.19	3.44	3.15	2.67	
Diversity	3.06	3.79	3.65	3.41	
Close to Home	3.02	2.78	3.03	3.78	
College Focus (e.g. Religious School)	2.94	2.98	2.93	3.00	
Recommended by Teacher/Counselor	2.89	3.16	2.83	2.71	
Intramural/Club Sports	2.88	3.17	2.84	2.14	
Far from Home	2.78	3.08	2.70	3.07	
Knowing People in the Area	2.54	2.66	2.51	2.60	
Knowing Current Students	2.38	2.41	2.36	2.67	
Prestige of Athletics	2.29	2.81	2.19	1.89	
Friend Attended	2.22	2.35	2.17	2.50	
Family Member Attended	2.03	2.12	1.99	2.17	
Athletic Scholarships	1.97	2.59	1.82	1.92	



Goals of enrollment marketing





Communication plan

- 1. Supports the recruitment plan with multi-channel messaging
- 2. Works on behalf of the admissions office and the institution to provide a consistent, clear stream of key messages
- 3. Provides the right message at the right time to the right audience:
 - Freshman
 - Transfer
 - Parent
 - Counselor
- 4. Understanding the communications plan is critical to consistent messaging in recruitment.



Financial aid analysis

- 1. Overall, marketing of the institution should create a strong sense of value:
 - The receipt of a scholarship, grant or other aid should "seal the deal,"
 not "be the deal."
- 2. Promotion of financial aid programs can be used to drive application pools:
 - Analysis and leveraging of aid are not alone useful in increasing application volume.
- 3. Analysis and leveraging are primarily strategies to drive deposits/enrollments from admitted student pools.



Leveraging defined

- The strategic use of discretionary aid to influence enrollment behavior
- 2. The initial and ongoing analysis of need gaps and corresponding enrollment behaviors that drive financial aid strategies
- 3. A tool to assess and improve yield of admitted to enrolled students and/or retention of degree-seeking students
- 4. Assessment of student ability and willingness to pay the cost of education at your institution



Financial aid leveraging conceptual map

ity to		Highest ability	High ability	Medium ability	Low ability	No data
	No need					
	Low need					
	Medium need					
	High need					
	No FAFSA data					



Innovations in student records

- 1. Traditional records are limited in their value outside of higher education:
 - Most employers do not use them other than to verify degree attainment, if at all
 - Communicate what was taken but not what was learned
 - Include only academic course history and not learning outside the classroom
- 2. Most students struggle to recall their experiences and learning during interviews:
 - We have not helped them make the connections between taking courses or participation and learning.



What is missing?

- 1. Learning outcomes:
 - What was learned versus what was taken?
- 2. Learning that may occur outside the structure of the academic course catalog:
 - Many internships and study abroad courses have places within the course catalog
- 3. Skills and competencies that are mastered by students during a degree or certificate program:
 - Learning outcomes are one form of these
- 4. Ways to record learning in competency-based education (CBE)



Learning beyond the classroom

- 1. Growing and widespread acceptance that students learn through experiences outside the classroom setting (online or live):
 - Internships
 - Leadership opportunities
 - Global study (study abroad)
 - Civic engagement/service
- 2. Much of the work to record experiences outside the course catalog has fallen to student affairs/student life offices:
 - Faculty supervision of or engagement with this learning is uneven.



Learning beyond the classroom

- 3. Faculty engagement with learning requires/demands a critical partnership with student affairs areas:
 - Common understandings of what constitutes learning and learned persons
 - Synergies of academic and co-curricular experiences
- 4. Capturing and measuring learning is developing outside the course catalog but requires greater development, generally



AACRAO – NASPA CSR Project

- 1. 18-month project to accelerate the development of innovative student records models
- 2. Funded by \$1.56M USD from Lumina Foundation
- 3. Engaged 12 American colleges and universities to develop model records along one or more areas:
 - Learning outcomes
 - Competency-based education
 - Learning outside the classroom
- 4. All records must be digital with consideration of portability in the future



Model convergence – about five types

- 1. Visualizations
- 2. Widgets 3-dimensional data
- 3. Competency-based Education (CBE) records
- 4. Institutional reporting/tracking
- 5. Data capture of outside-the-classroom activity



Visualizations – Elon and IUPUI



ELON EXPERIENCES VISUAL TRANSCRIPT

Elon University validates all information presented on a student's Elon Experiences Transcript. Validation occurs within each program responsible for the experiences and is then maintaned in a centralized system. Students do not personally enter any experiences onto their Elon Experiences Transcript. The Elon Experiences Transcript is an official document of Elon University. For more information about the Elon Experiences Transcript visit our site.

STUDENT INFORMATION

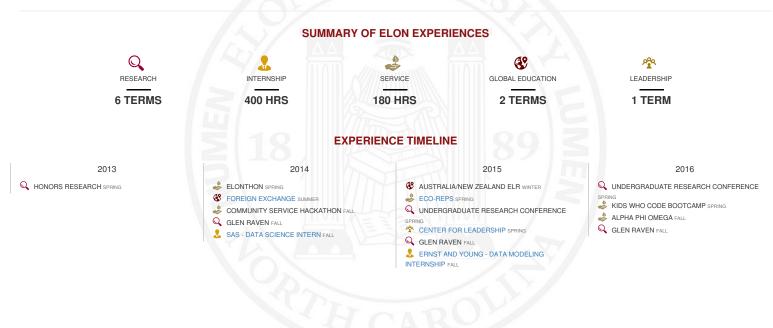
NAME JOHN S. DOE

DEGREE B.SC

MAJOR APPLIED MATHEMATICS

COMPUTER SCIENCE

COMPLETE 28TH OF NOVEMBER 2016



parchment⁻





Visualizations – Elon and IUPUI

Diversity



- Coordinator Disability Awareness Week IUPUI, Indianapolis IN - 60 Hours
- Diversity Experience Title that takes up a really
- whole lot of room on page Someplace, Indianapolis Indiana - 50 Hours
- Multicultural Leadership Empowerment Program
- 40 Hours
- Diversity Experience Title #2 takes up a really whole lot of room on page Carbondale, IL - 25 Hours

Global Engagement

- <experience info>
- <city, state/province/territory, country> 2 Semesters





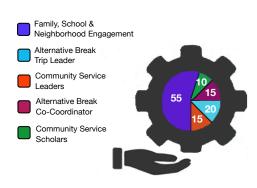
Research Hours



Official record page 2 of 2 created on <mm/dd/yyyy> for <student name> <student ID>

Leadership - Fraternity Treasurer, Phi Delta Theta IUPUI Indianapolis IN USA - 4 Semesters - Fraternity Vice President, Phi Delta Theta IUPUI, Indianapolis IN USA - 2 Semesters

Service Hours





Visualization – University of Central Oklahoma

Firstname Lastname *00001234 ****-**-1254 Today's Date



The purpose of this record is to provide a visual representation of this student's achievement in the University of Central Oklahoma's (UCO) Tenets of Transformative Learning.

This student's educational experience at UCO has resulted in achievements at the exposure, integration or transformation level as indicated below.

See the key on the back of this document for short descriptions of what these levels of learning indicate with regard to student knowledge and experience.

These experiences have been assessed and validated by trained faculty and professional staff members at the University of Central Oklahoma.



- ▶ GC Dropbox Life Review Care of Vulnerable Individuals Fall 2016 Exposure
- ▶ Mod 6 Korea Lecture--STLR Global Cultural Competency International Marketing Fall 2016 Exposure
- ▶ Assignment 2 Photo Essay Regional Geo Of The World Fall 2016 Integration



- ▶ Research, Creative, & Scholarly Activities Dropbox Music Outreach Program 2016 Fall 2016 Integration
- ▶ Mosquito Experiment Biology I for Majors Fall 2016 Exposure
- ▶ RCSA Reflection Assignment STLR- Dropbox Landmark Cases in Forensic Sci Fall 2016 Integration
- Assignment 2 Photo Essay Regional Geo Of The World Fall 2016 Integration



- ▶ Assignment 2 Photo Essay Regional Geo Of The World Fall 2016 Integration
- Marriage Initiative STLR Assignment Landmark Cases in Forensic Sci Fall 2016 Exposure
- ▶ GC Dropbox Life Review Care of Vulnerable Individuals Fall 2016 Exposure



- ▶ Assignment 2 Photo Essay Regional Geo Of The World Fall 2016 Integration
- ► Service Learning Project STLR Success Central Fall 2016 Transformation



- ▶ The Little Event-STLR Success Central Fall 2016 Integration
- ▶ OIFC Visit Reflection Paper Intro to Crime Analysis Fall 2016 Exposure







Career Readiness Meta Digital Badge

Identify and articulate one's skills, strengths, knowledge, and experiences relevant to the position desired and career goals, and identify areas necessary for professional growth. The individual is able to navigate and explore options, understands and can take the steps necessary to pursue opportunities, and understands how to self-advocate for opportunities in the workplace.

LaGuardia Core Competencies: Inquiry and Problem Solving and Global Learning

Student Affairs Developmental Experiences: Teaching Behaviors for Personal and Professional Success



Widgets – three-dimensional records: LaGuardia Community College badges

- Embedded content available by clicking on the badge to see links to additional information
- 2. E-portfolio used at LGCC to record student achievements
- 3. Some of the assets available are video reflections by students that capture the learning outcomes of internship and other experiences

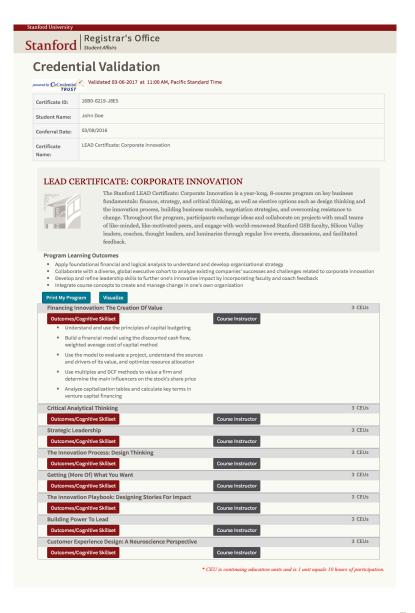


Widgets - three-dimensional records: Stanford



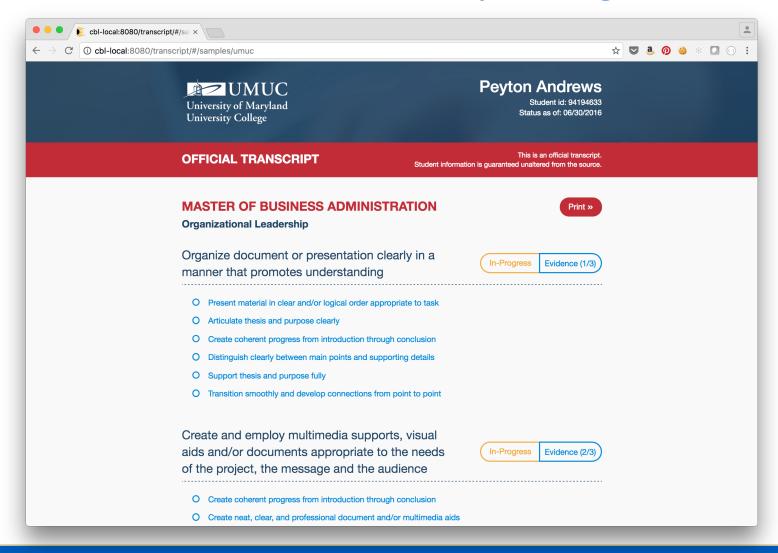






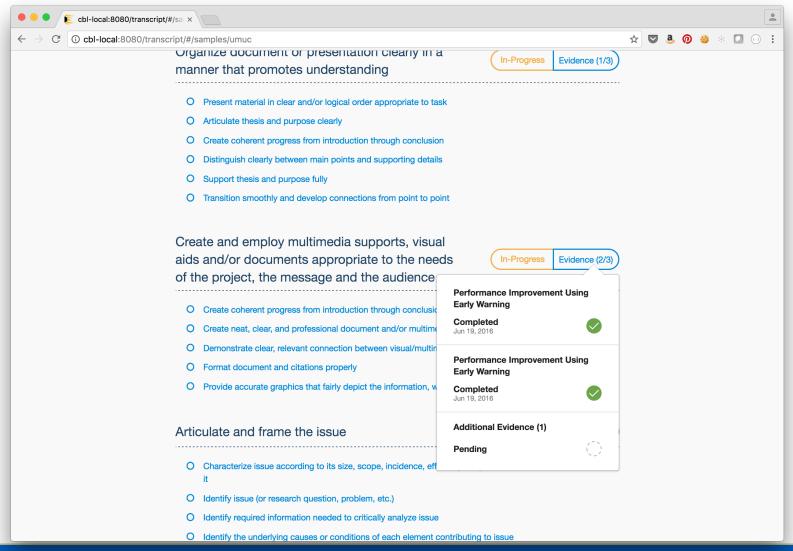


CBE records: UM University College





CBE records: UM University College





CBE records: UW Extension



UW Colleges

Peyton **Andrews**

Student ID: 1234567 Generated on: 9/30/2016

COMPETENCY RECORD 6



This competency record is from the University of Wisconsin Colleges Office of the Registrar

PSY 202 - Introductory Psychology

Credits: 3 Grade: B Completed: July 2015

Competencies (6 complete, 6 total)

Explain the basic methods of research used by psychologists and the reasons for these

Mastery

Apply knowledge of phsysiology to human abilities and limitations

Mastery

Apply basic concepts from development, personality, and social pshychology to real-life situations

Mastery

Apply principles of learning and memory theory to everyday life

Mastery

Articulate various dimensions of the nature-nurture question

Mastery

Apply basic theoretical perspectives to real-world problems

Mastery

Less...

BIOL 141 - Heredity

Credits: 3 Grade: IP

Order a transcript





CATEGORIES OF COMPREHENSIVE STUDENT RECORD





AUTOMATIC DIRECT FEED FROM BANNER TO CSR

DEGREE(S), ACADEMIC
PROGRAM/MAJOR,
COMPETENCIES & COURSES
COMPLETED, BADGES
EARNED, UNIVERSITY
ADDRESSED CERTIFICATIONS



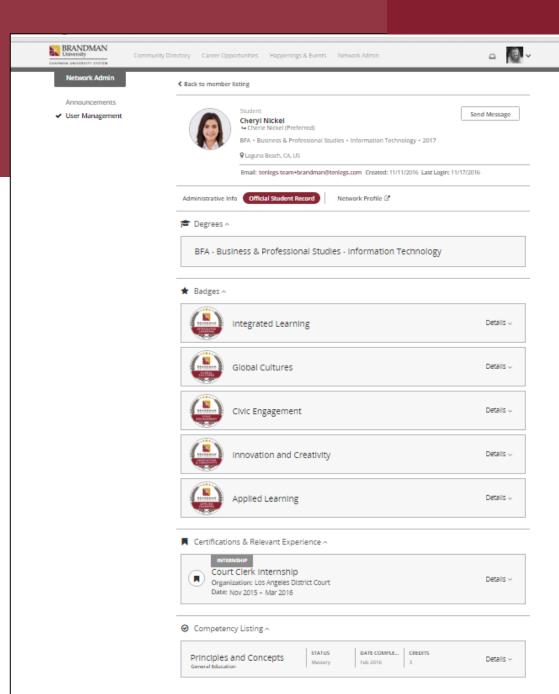
STUDENT SUBMITTED DOCS
VERIFIED BY APPLICABLE
SCHOOL OFFICIAL
THRU WORKFLOW

UNIVERSITY INTERNSHIPS, ORGANIZATION MEMBERSHIPS



STUDENT SUBMITTED DOCS UNVERIFIED (DISCLAIMER INCLUDED)

PORTFOLIO,
PROFESSIONAL/MILITARY/
WORK CITATIONS, CIVIC &
VOLUNTEER ACTIVITIES,
NON-UNIVERSITY
CERTIFICATIONS



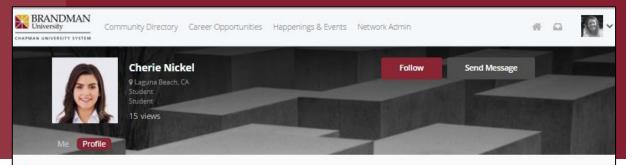
Official University Record (verified)



Summary view with click to open metadata:

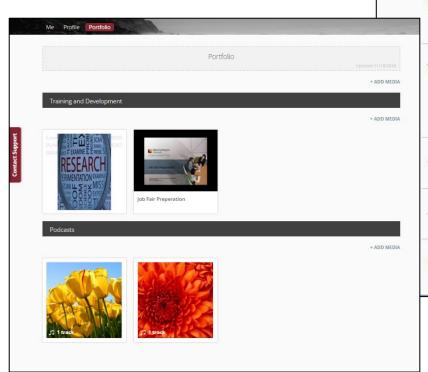
- -Description
- -Criteria
- -Evidence

Student Loaded (Unverified)



Professional profile & portfolio Externally shareable links & printable

Ability to create multiple versions tailored for unique career fields



Profile

BIO

I am an experienced mid-career professional pursuing a Bachelor's of Science in Nursing. I am building on my past several years of experience working in the nursing and healthcare fields, pursuing my passion for serving people.

EDUCATION

Brandman University

2015 - 2017 · Bachelor of Science in Nursing · Nursing & Health Professions Department

WORK EXPERIENCE

Nursing Assistant

Grand View Healthcare - Outpatient Care Center, Los Angeles, CA • 2012 - 2014 Assisted nurses and doctors with wide range of treatment and care processes.

SKILLS

ing Hospital Unit Administration

Bedside Procedures

Patient Care

ACCOLADES

Nursing Assistant of the Year Award - Grand View Healthcare, 2014

LINKS

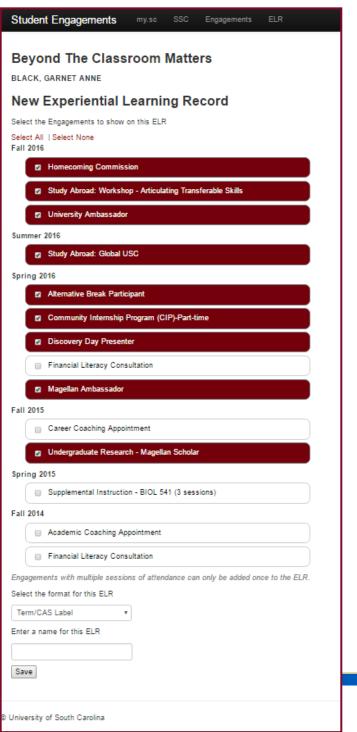






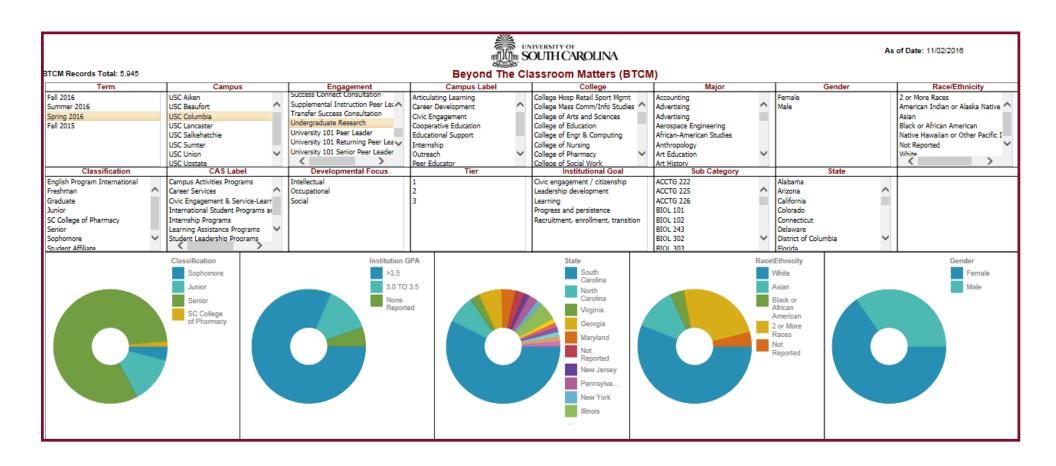
Recording and Tracking: University of South Carolina

The student selects the records she/he would like to display on the Experiential Learning Transcript ELR)





Recording and Tracking: University of South Carolina





Additional Resources

1. Publications:

- Core Concepts of SEM (Sigler, 2017)
- The Handbook of Strategic Enrollment Management (Hossler, 2014)

2. Conferences:

SEM XXVII, Phoenix, AZ, October 29
 — November 1, 2017

3. Training:

- Essentials of SEM online course
- SEM-EP online courses
- AACRAO on the Road, October 9-10, Chicago, IL





Questions and Discussion

Thank you!

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