Built to Plan

DO-IT-YOURSELF STRATEGIC ENROLLMENT PLANNING
Sara Wiedman
Associate Vice President, Enrollment Management

Erin Mann
Associate Provost, Academic Operations
Session Overview

• The Basics: Making SEP Your Own
  • What is SEP and Why Do It
  • Leadership and Organization
  • Data Collection
  • Communication

• The Dirt: Lessons Learned
  • Missteps & Roadblocks
  • Year 1 Achievements
  • Trade-offs
  • Benefits
The Basics
Making SEP Your Own
What is Strategic Enrollment Planning?

Data informed process to align enrollment management strategies with academic, co-curricular, and fiscal strategies

Goals

• Engage all university stakeholders
• Promote recruitment, retention, and graduation
• Position university for academic success and fiscal sustainability
Alignment with Other Institutional Plans

Source: Ruffalo Noel Levitz - Strategic Enrollment Planning: A Dynamic Collaboration
The WHY of SEP

• Why do it?
  • Respond to industry changes; anticipate future trends
  • Increase campus engagement and buy-in

• Why do it yourself?
  • Cost savings
  • Familiarity with institution and its needs

• Process vs. product
The Process

- RNL, ACT, AACRAO all have similar, well-defined processes
- No need to reinvent the wheel: semi-homemade is fine
- Tailoring
  - Roadblocks?
  - Time, $$$, quality
Leadership Team

- Equal partnership between Enrollment Management and Academic Affairs

- Consider:
  - Available time
  - Ability to communicate and collaborate
  - Broad knowledge of your institution
Phases of SEP

**Phase 1**
- Preparation & Data Analysis
  - Process Design
  - Coalition Building
  - Data Collection

**Phase 2**
- Strategies
  - Situational Analysis
  - Develop Strategies
  - Identify Tactics

**Phase 3**
- Enrollment Goals & KPIs
  - KPIs
  - Enrollment Projections
  - Finalize written SEP

**Phase 4**
- Implement & Assess
  - Implement Plan
  - Monitor & Assess
  - Update Plan
Data Collection

- Internal: IR, EM, marketing, cabinet
  - Quantitative and qualitative
- External: IPEDS, WICHE, EMSI, studies commissioned by the institution
Data Management Strategy

- Organization
  - Centralized location of data
  - Folders and naming convention
- Sharing
  - Transparency
  - Direct teams to relevant data
COMMUNICATION

• Goal: awareness, coalition building, and administrative support
  • With whom and in what order?

• Input In
• Information Out
• Cheerlead, cheerlead, cheerlead, cheerlead
Input In

- Key: Steering committee and working groups
- Frequent and obvious opportunities for all stakeholders
- Vary techniques
- Publish input to Cabinet, all stakeholders
- Perform transparency
• **You cannot over-communicate**

• Often disguised as “Input In”

• Our techniques:
  • Identify & engage campus influencers
  • Faculty and staff meeting presentations
  • SEP Digest
  • Meetings, meetings, meetings
    • Meet people where they are
  • Lunch
The Dirt
Lessons Learned
Missteps & Challenges

- Data overload
- 33% working group failure rate (2 of 6)
- Change doesn’t wait for the perfect process
- Managing the people aspect
  - Culture
  - Naysayers
  - Managing up
Road Blocks

- Lack of vision
- Lack of available in-house marketing expert
- Leadership change (twice!)
- Initiative fatigue
Achievements

• Buy-in
  • Widespread awareness of challenges facing Lindenwood and higher ed industry
  • Developing campus-wide strategic thinking
  • Breaking down silos

• Improved working relationship between AA & EM

• 200 proposed tactics for exploration
Trade-Offs: Homemade vs. Consultant

Homemade
- Timeline: unexpected delays, but ability to adjust
- Cost: no consultant fees
- Quality: internal perspective and in-depth knowledge

Consultant
- Timeline: consistent due to dedicated vendor resources
- Cost: lower internal human resource cost
- Quality: objective expertise
Benefits

- Low-cost
  - LU approximate first-year cost: $4500, ~70% of two high-level administrators’ time

- Control of process
  - Tailored to needs of institution

- Build internal capability for strategic planning
Questions?

Erin Mann – emann@lindenwood.edu
Sara Wiedman – swiedman@lindenwood.edu