Preparing for Strategic Enrollment Planning at The University of Texas at San Antonio

November 7-8, 2017
Session Agenda

- Fundamentals of Strategic Enrollment Planning
- Organization
- Planning Assumptions
- Key Performance Indicators
- Project Timeline
Mission

The University of Texas at San Antonio is dedicated to the advancement of knowledge through research and discovery, teaching and learning, community engagement and public service. As an institution of access and excellence, UTSA embraces multicultural traditions and serves as a center for intellectual and creative resources as well as a catalyst for socioeconomic development and the commercialization of intellectual property – for Texas, the nation and the world.
Vision

To be a premier public research university, providing access to educational excellence and preparing citizen leaders for the global environment.
Core Values

We encourage an environment of dialogue and discovery, where integrity, excellence, inclusiveness, respect, collaboration and innovation are fostered.
HERE FOR A REASON.

TO MAKE COLLEGES, UNIVERSITIES & NON-PROFITS SUCCESSFUL & VIBRANT THROUGH INSPIRED & RELEVANT ENGAGEMENT.

RUFFALO™
NOEL LEVITZ
Strategic Enrollment Task Force’s Charge

The Strategic Enrollment Task Force will develop an integrated strategic enrollment plan that includes goals, metrics, accountability and self assessment. The plan will adopt a creative, data analytics-driven strategy for strategic enrollment, examining both the Main and Downtown Campuses as well as online offerings. The task force will create a set of guiding assumptions around work force needs, WSCH production, and differentiated tuition, as well as capital, infrastructure, student services, and faculty line needs. Considerations will include the 60/30 TX Higher Education Plan (Texas Higher Education Coordinating Board) as well as the optimal mix of undergraduate and graduate students, in-state and out-of-state students, and international students.
Fundamentals of SEP
and
The Shape of Our Work Together
SEP encompasses the entirety of the student lifecycle
Traditional Planning
Set goals then develop steps to achieve those goals

Strategic Planning
Align organization with its environment to promote stability, sustainability, growth, and/or excellence
Strategic enrollment planning is a continuous and data-informed process that:

• Provides realistic, quantifiable goals;
• Uses a return-on-investment (ROI) and action item approach;
• Aligns the institution’s mission, current state, and changing environment; and
• Aligns and integrates academic and co-curricular planning with marketing, recruitment, retention, and financial aid strategies...

...to foster planned long-term enrollment and fiscal health.
INSTITUTIONAL STRATEGIC PLANNING

Strategic Enrollment Plan

Annual Plans

- Implementation Tactics
- Monitoring and Evaluating Tactics
- Plan Additions and Modifications

Mission

Enrollment and Fiscal KPIs

Vision

Enrollment and Fiscal Strategies

Institutional Effectiveness

Enrollment and Fiscal Goals
# Active Planning

<table>
<thead>
<tr>
<th>Leadership Engagement</th>
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<tr>
<td>Agreement on Process</td>
<td>Planning Context</td>
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<th>Grounded in Data</th>
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<tr>
<td>Internal</td>
<td>CURRENT</td>
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<th>Broad Participation</th>
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<td>Leadership</td>
<td>Communication</td>
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Phases of strategic enrollment planning

- Continuous process

**Preparation & Data Analysis**
- Preparation
- Key Performance Indicators
- Data Collection
- SWOT Identification
- Situation Analysis

**Strategies**
- Strategy Ideation
- Action Plan Development
- ROI Considerations
- Strategy Prioritization

**Enrollment Goals**
- Enrollment Projections
- Goal-Setting
- Finalize Written Plan

**Implementation & Continuation**
- Implementation of Plan
- Monitoring and Evaluation
- Refresh Situation Analysis
- Plan Modifications and Revisions

9 – 12 months
## SEP Timeline

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UTSA’s SEP Organization

Strategic Enrollment Task Force

- Undergraduate Academic Programs
- Graduate Academic Programs
- Marketing & Recruitment
- Finance & Financial Aid

Student Success Task Force

Data
Communications
Infrastructure/Technology
Strategic Enrollment Task Force Responsibilities

- Coordinate data collection and review (with data team)
- Review the working groups’ situation analyses
- Ensure the working groups meet and collaborate
- Strategy ideation
- Review and sharpen the strategy action plans
- Prioritize the SEP strategies
- Make recommendations to the President
- Write the plan
- Ensure transition to the implementation and continuation phase
Working Group Responsibilities

- Focus area situation analyses
- Strategy ideation
- Develop long-term, practical, data-informed, and tangible action plans that are executable
## Enrollment growth strategy matrix

<table>
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<th>Existing Markets</th>
<th>New Markets</th>
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<tr>
<td><strong>Existing Programs/Services</strong></td>
<td><strong>New Programs/Services</strong></td>
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<tr>
<td>Market penetration</td>
<td>Program development</td>
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<tr>
<td><strong>Market development</strong></td>
<td><strong>Diversification</strong></td>
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Academic and co-curricular programs

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<th>Enrollment as Percent of Capacity</th>
<th>Manage</th>
<th>Sustain or expand</th>
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<td>Reduce or eliminate</td>
<td></td>
<td>Grow</td>
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Net Operating Income Per Student
Competition, market demand, program strength

Competition:
Unoccupied market positions
-- Differentiation

Market Demand:
What students and the job market want
-- Relevance

Program:
What we do well
-- Authenticity
A Balanced Plan

- **Program** (academic, co-curricular, services, support)
- **Place** (on-site, off-site, online, hybrid)
- **Price and Revenue** (tuition, fees, discounts, incentives)
- **Promotion** (marketing, recruitment, web presence)
- **Purpose and Identity** (mission, distinctiveness, brand)
- **Process** (data-informed, integrated planning)
Planning Assumptions and Key Performance Indicators
What are key performance indicators (KPIs)?

Key Performance Indicators

- KPIs are commonly-acknowledged measurements that are directly related and critical to the mission and fiscal health of the institution.

Performance Indicators

- PIIs are important measurements that are indirectly related to the mission and support critical performance metrics.
Institution-specific, data-derived measurements that are the foundation for determining the current state of the institution and, when matched with historical comparisons, are relevant for creation of situation analyses and overall strategic planning.

Reflect effectiveness of broad, cross-departmental cooperation.

Provide more meaning when compared to those of similar, competing, and/or aspirant institutions.

Are often the most complex, reflecting strategic actions that take considerable time to evolve.

Are supported by and dependent on multiple PIs.

KPIs – Drive strategic enrollment management
Typical KPI Categories

- Enrollment
- Student Quality
- Student Outcomes
- Market Position
- Fiscal Health
Why KPIs are so important

1. KPIs help define and evaluate the institution’s success and its progress toward long range goals. They are often a part of the institution’s data dashboard.

2. KPIs are the unifying force that brings together the institution’s community to a common cause and vision. A small number of KPIs helps ensure “top of mind” common cause.

3. KPIs provide focus, and, therefore, they are the prerequisite for efficient and effective strategic enrollment planning, especially for data analyses, strategy development, assessment, and evaluation.
KPIs are often the most complex, reflecting strategic actions that take considerable time to evolve

Example KPI: Full-time Undergraduate Headcount
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