

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

November 7-8, 2017

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# 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**<sup>SM</sup>  
NOEL LEVITZ

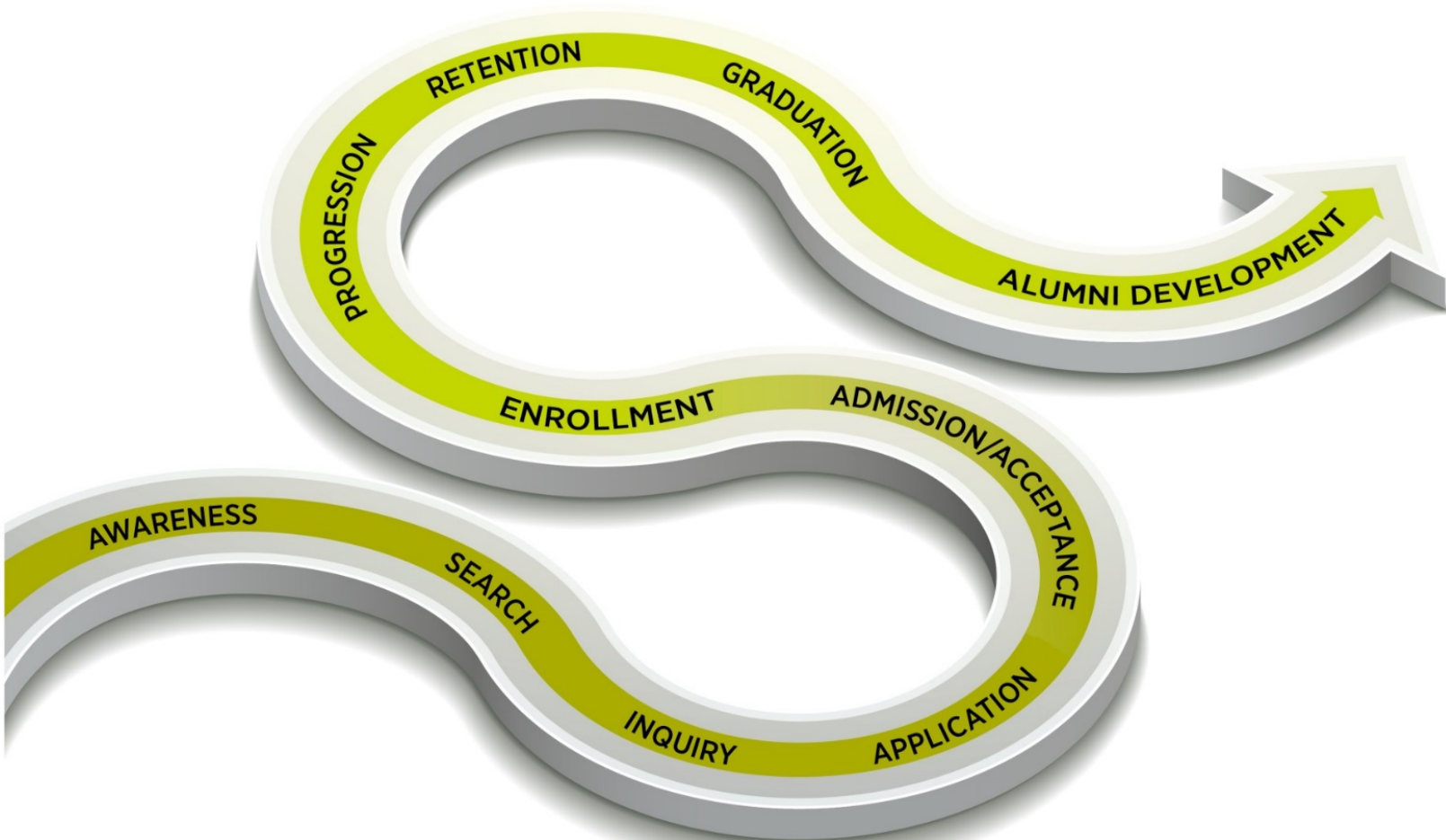
# Strategic Enrollment Task Force's Charge

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

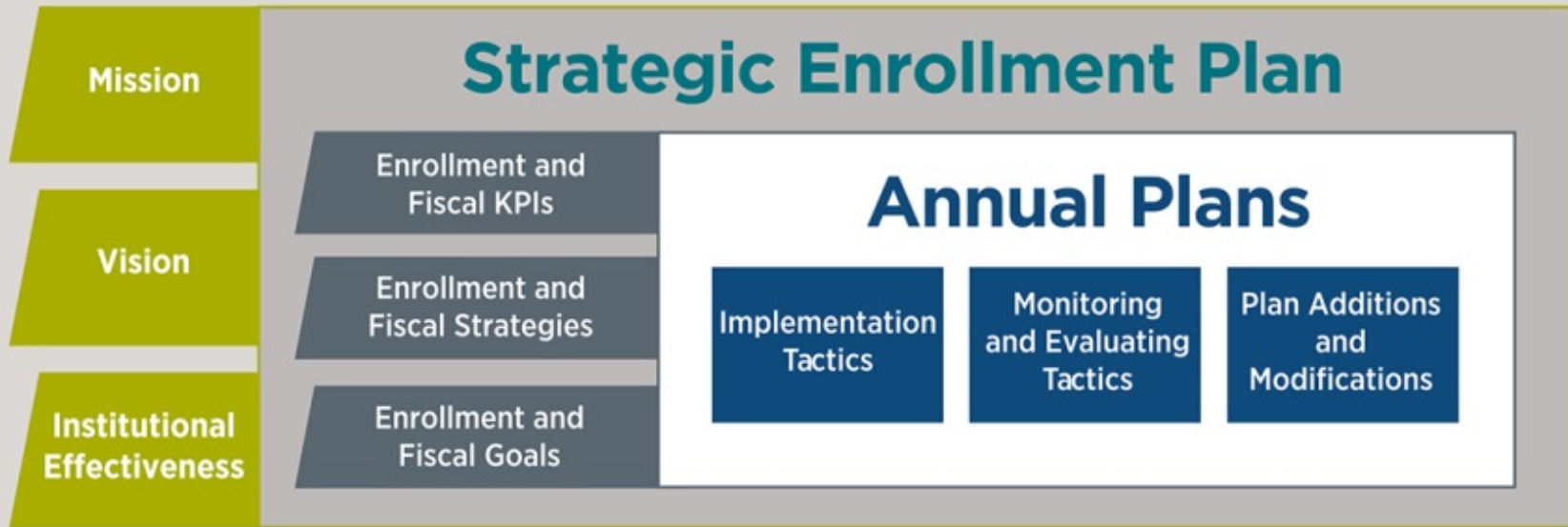
Align organization with its environment to promote stability, sustainability, growth, and/or excellence

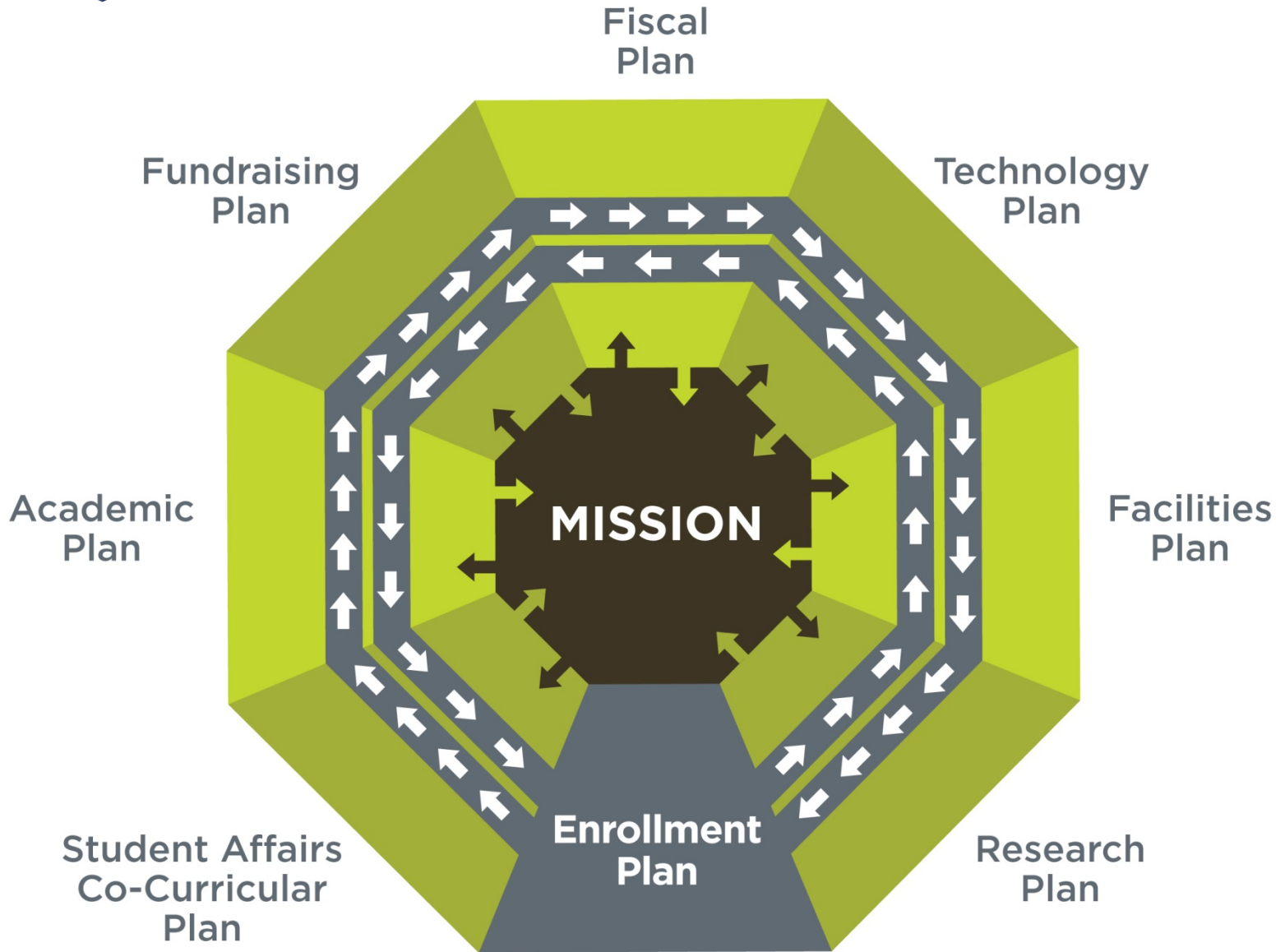
## Strategic enrollment planning is a continuous and data-informed process that:

- 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...

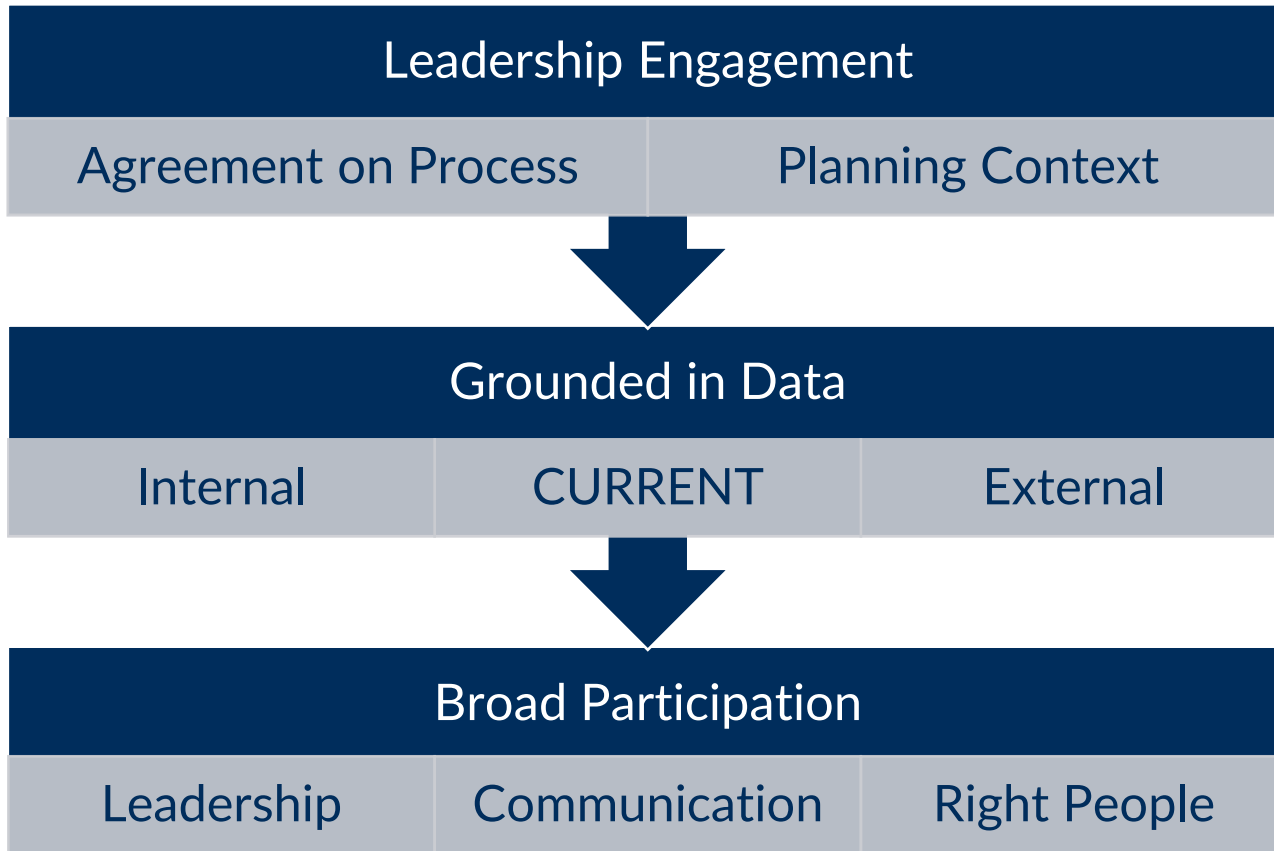
...to foster planned long-term enrollment and fiscal health.

# INSTITUTIONAL STRATEGIC PLANNING





# Active Planning



# Phases of strategic enrollment planning

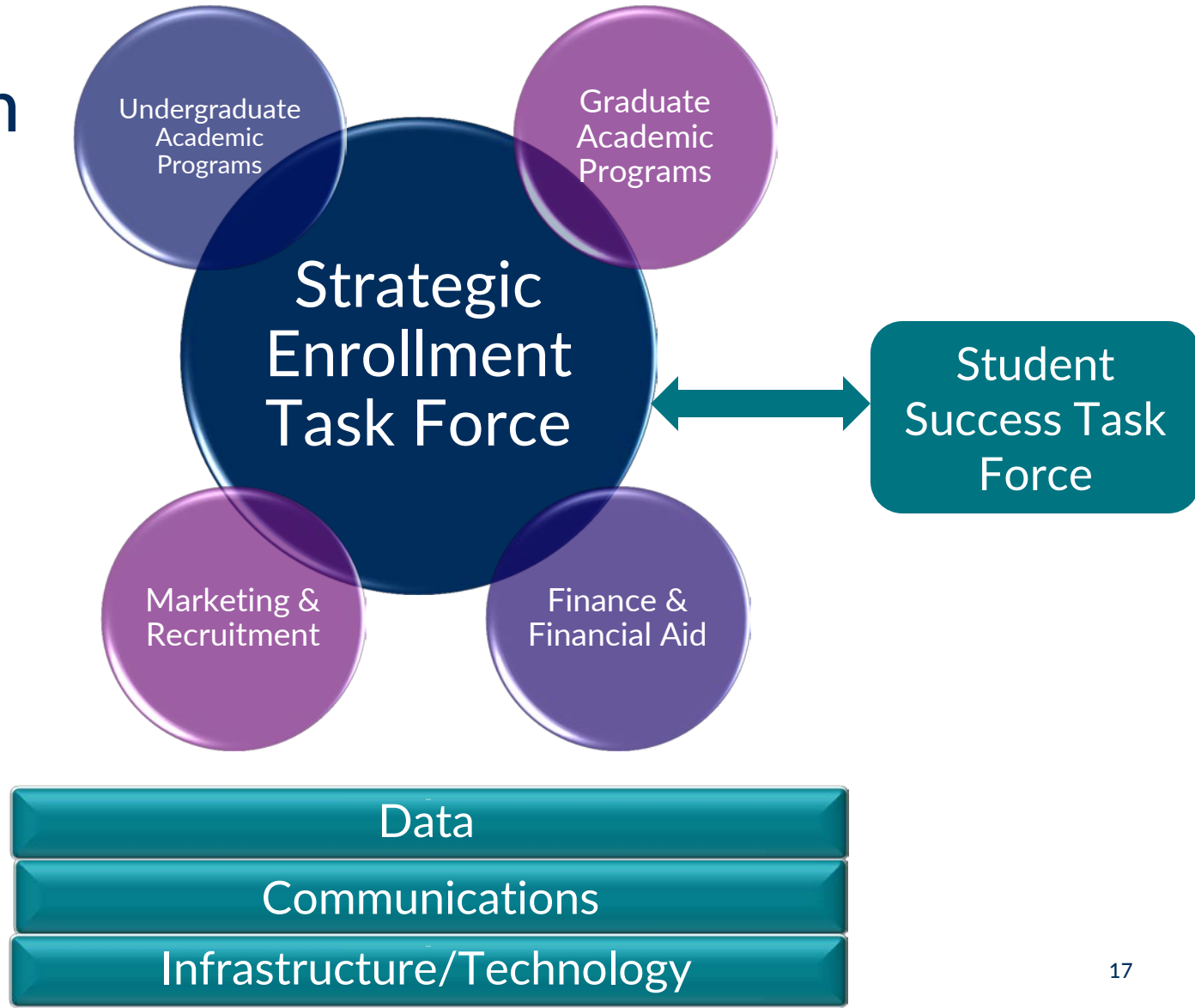


# SEP Timeline

Visit Number	Date	Objectives/Focus
One	November 7-8, 2017	SEP process discussion with leadership; solidify organization; identify preliminary planning assumptions and KPIs; set the stage
Two	December 5-6, 2017	Conference-style launch of SEP process with Task Force and Working Groups; SWOT identification; prepare for situation analysis
Three	January 2018	Situation analysis review; initial strategy ideation; action planning organization
Four	February 2018	Action plan review one; additional strategy ideation
Five	March 2018	Action plan review two
Six	April 2018	Strategy prioritization/plan formation
Seven	May 2018	Implementation/initial roll-out
Eight	Fall 2018	Implementation follow-up



# UTSA's SEP Organization



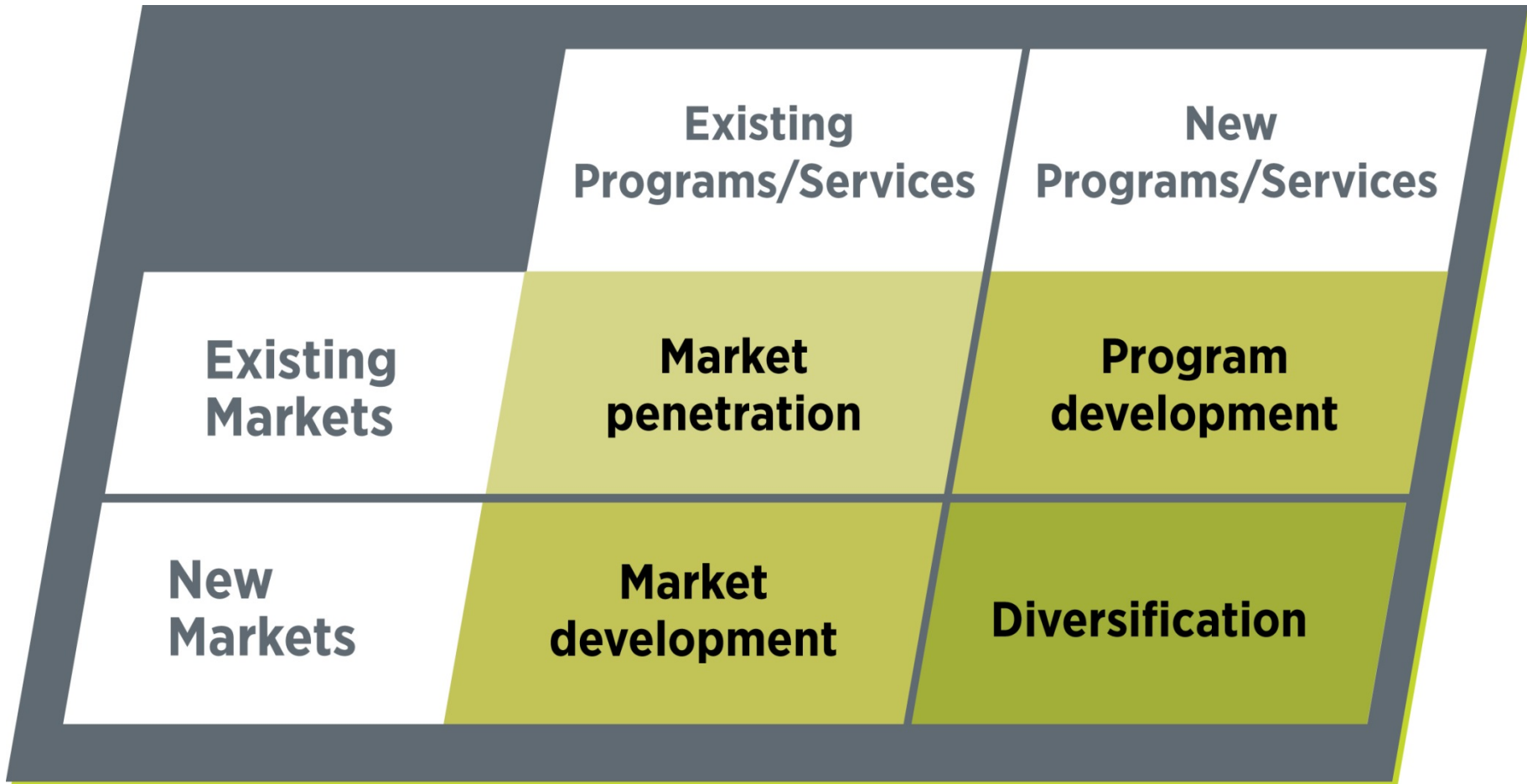
## Strategic Enrollment Task Force Responsibilities

- 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

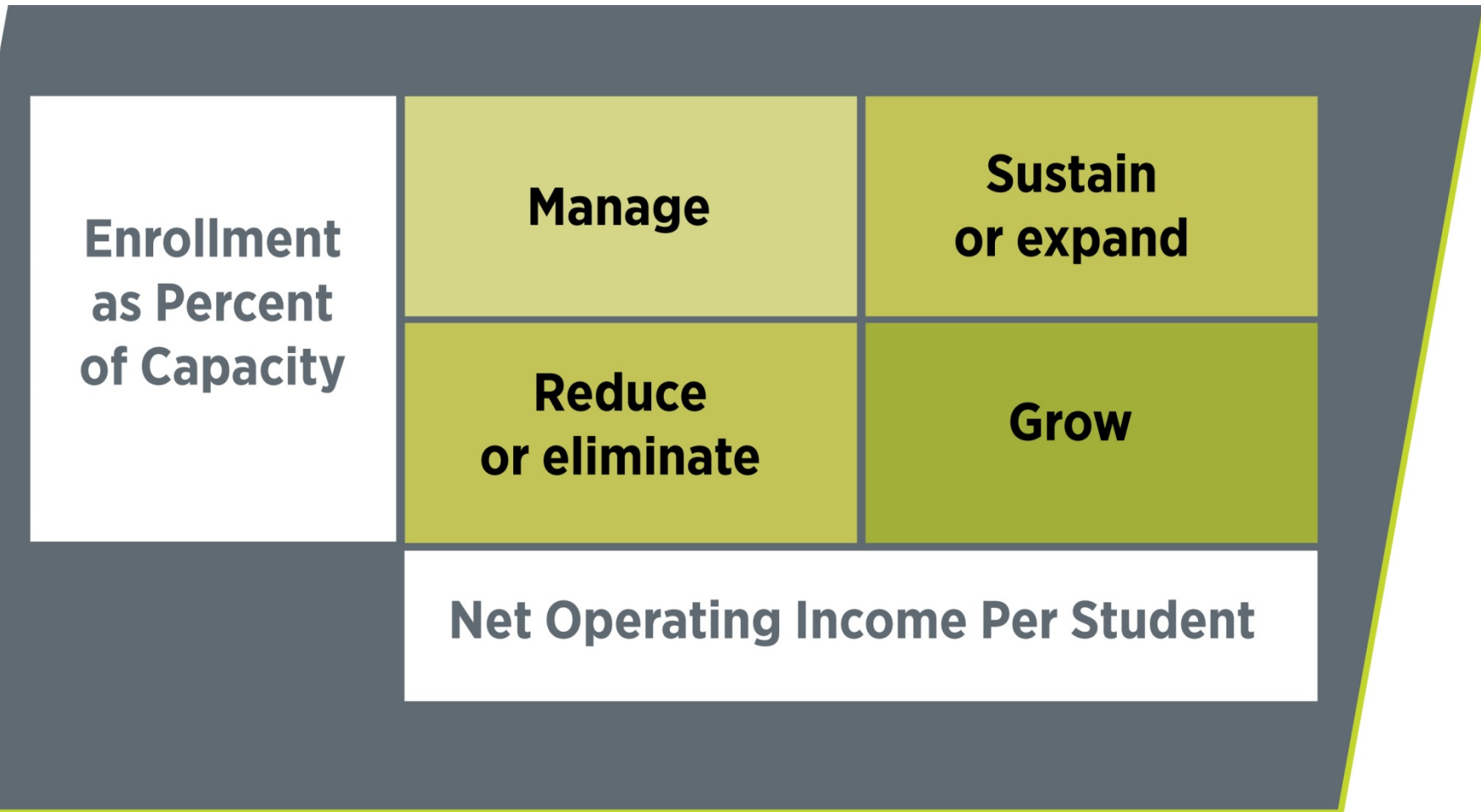
# Working Group Responsibilities

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

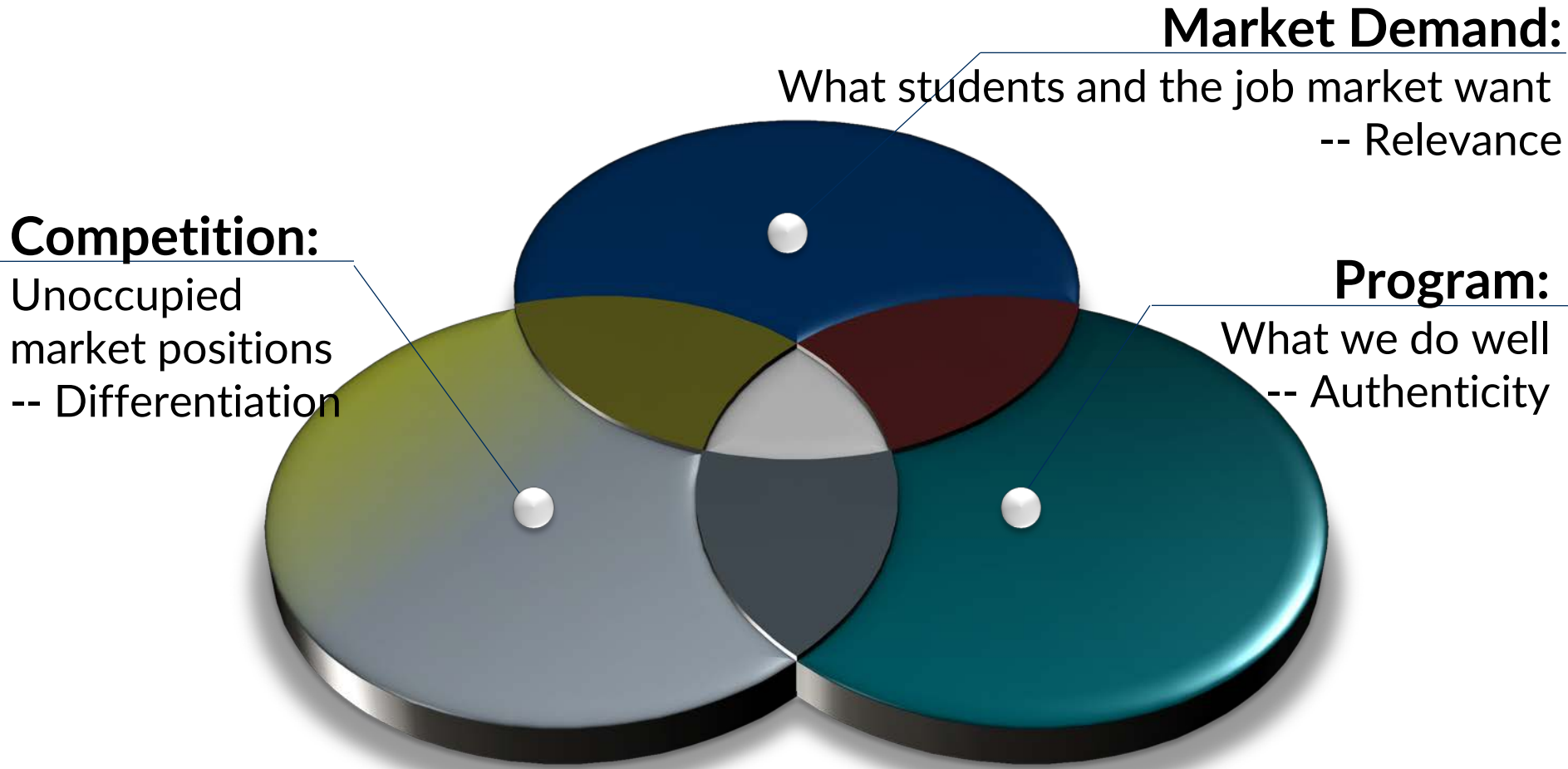
# Enrollment growth strategy matrix



# Academic and co-curricular programs



# Competition, market demand, program strength



# 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

- PIs are important measurements that are indirectly related to the mission and support critical performance metrics.

# KPIs – Drive strategic enrollment management



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

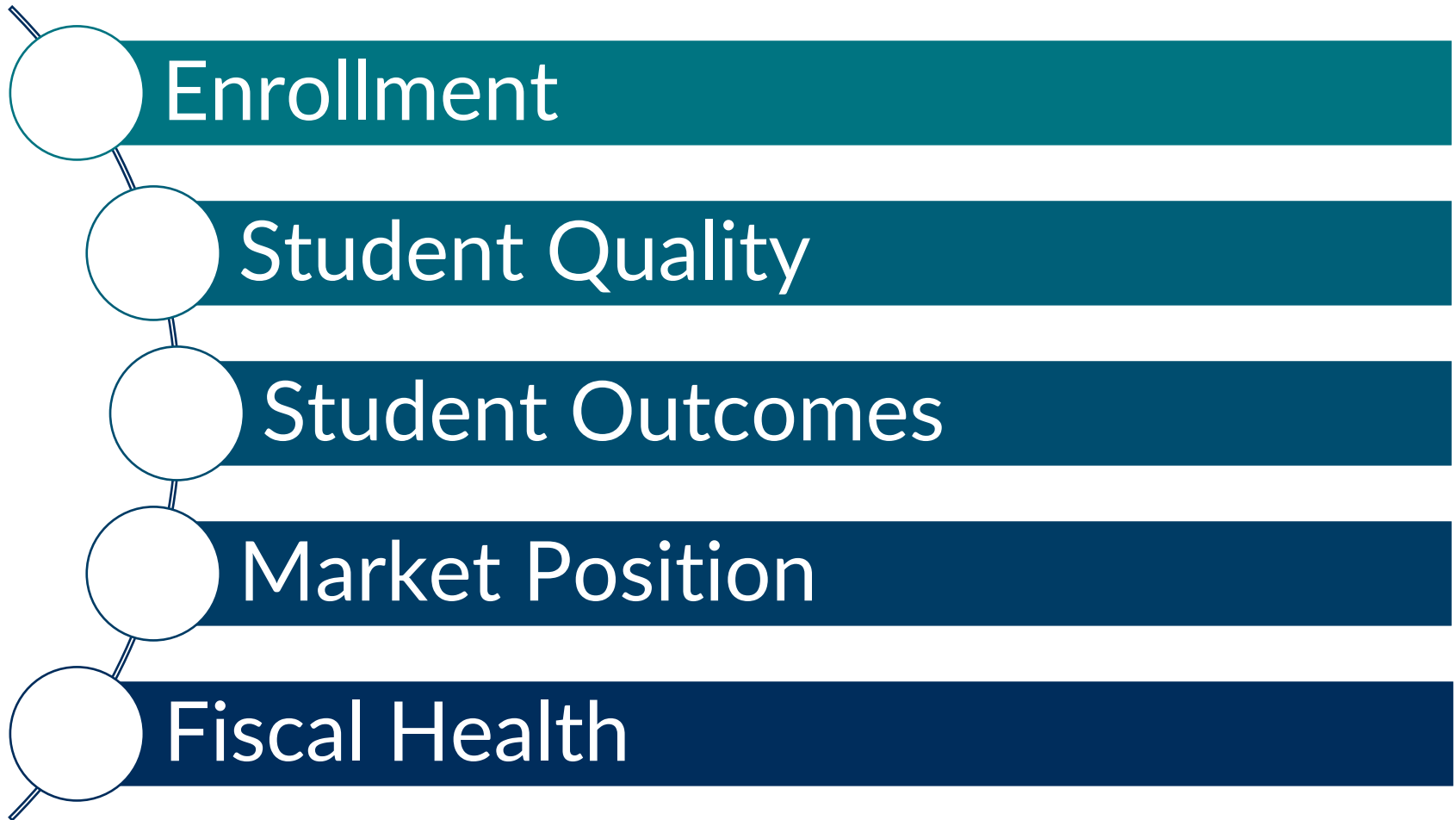
Reflect effectiveness of broad, cross-departmental cooperation

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

# Typical KPI Categories

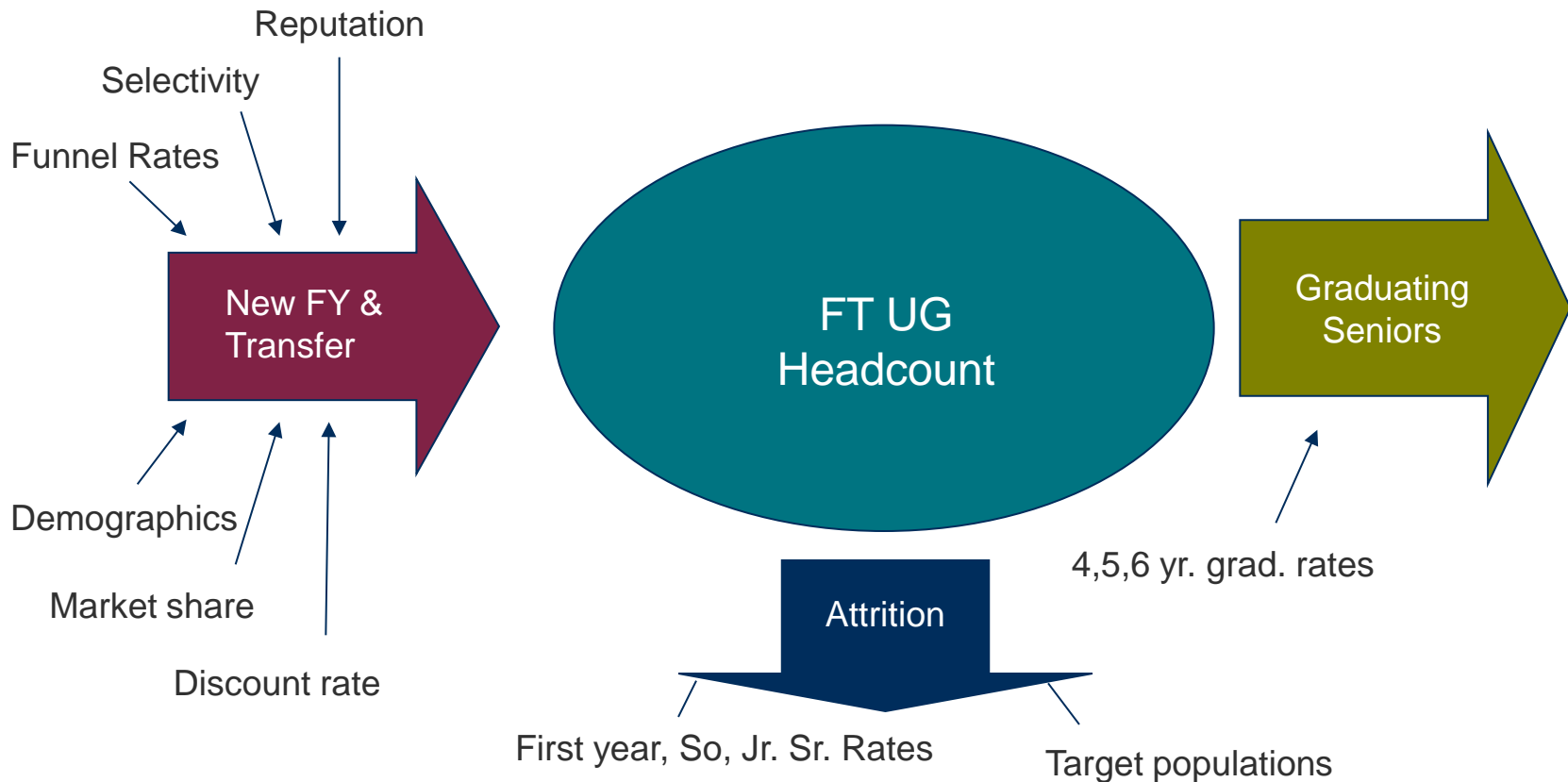


## Why KPIs are so important

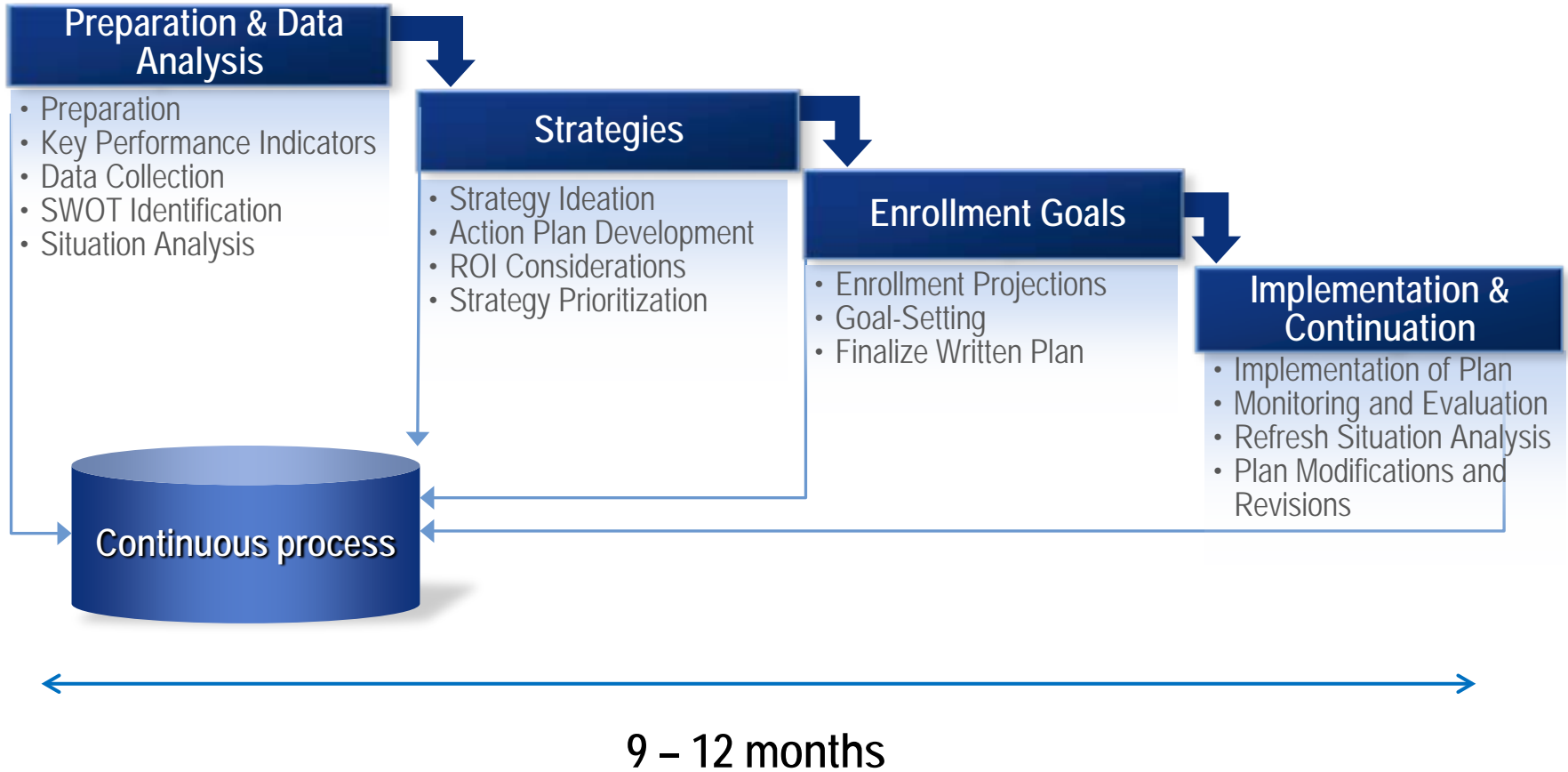
1. KPIs help **define and evaluate the institution's success** and its progress toward long range goals. They are often a part of the institution's data dashboard.
2. KPIs are the **unifying force** that brings together the institution's community to a common cause and vision. A small number of KPIs 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



# Phases of strategic enrollment planning



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A photograph of three-dimensional wooden letters spelling 'Q & A' arranged on a dark, textured surface that resembles a chalkboard. The letters are light-colored and have a natural wood grain. A faint, white chalk-like outline of the letters is visible on the surface behind them. The lighting creates soft shadows, giving the letters a three-dimensional appearance.

Q & A

Questions and Discussion