

# Strategic Enrollment Plan

Phase 1

SEPTEMBER 2018



**UTSA**<sup>®</sup>

## Executive Summary

President Taylor Eighmy initiated the UTSA Strategic Enrollment Planning (SEP) Task Force October 2017. The twenty-seven member task force, chaired by Dr. Lisa G. Blazer, partnered with Ruffalo Noel-Levitz on a year-long process to create the first phase of the UTSA Strategic Enrollment Plan. Just as important, the Task Force created a dynamic and continuous process through which the university can identify, develop, and implement strategic enrollment initiatives now and into the future.

### The Planning Process

The SEP Task Force has developed an integrated strategic enrollment plan that relies on well-designed strategy action plans. The action plans include clear implementation timelines, accountability structures, detailed budgets, enrollment projections, and evaluation and assessment metrics. In developing the plan, the Task Force considered 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.

Enrollment targets are grounded in historical enrollment data as well as future demographics and market trends. The Western Interstate Commission for Higher Education (WICHE) in their December 2016 report, *Knocking at the College Door*, high school graduates nationwide will decrease, while states like Texas will be stable or increase. Additionally, by 2025, the overall number of high school graduates will increase moderately with most states seeing growth. Finally, by 2030, there is an expected decline across the nation, but Texas is projected to continue to increase.<sup>1</sup>

To strategically increase our enrollment and maintain our market share of Texas college-bound students, we will focus on areas that provide us market advantages that align with work force needs and play to our strengths in business, data sciences, STEM and education. UTSA is the 8<sup>th</sup> largest public university in Texas as of the Fall 2017 semester<sup>2</sup> and we have continued that growth trend Fall 2018. While recruitment in Texas has become increasingly competitive, through new strategic priorities and projects, focused on traditional college age students, transfer students and graduate students, enrollment numbers will continue to increase, allowing UTSA to be a prosperity engine graduating world-engaged civic leaders of tomorrow.

We will focus on areas that provide us market advantages that align with work force needs and play to our strengths in business, data sciences, STEM and education.

<sup>1</sup> WICHE: *Knocking at the College Door: Projection of High School Graduates*, December 2016

<sup>2</sup> Source: [https://en.wikipedia.org/wiki/Lisa\\_of\\_universities\\_in\\_Texas\\_by\\_enrollment](https://en.wikipedia.org/wiki/Lisa_of_universities_in_Texas_by_enrollment)

In order to reach our targets and set strategic enrollment goals across all disciplines, the SEP will roll out in phases. The first phase of UTSA's SEP largely focuses on process improvements in enrollment functional areas and includes the following strategies.

- CRM Solution
- Dual Enrollment
- Financial Aid Leveraging
- Online Self-Service Improvements
- Prospect and Inquiry Management
- Transfer Student Recruitment
- Undergraduate Scholarship Management
- University-Wide Undergraduate Recruitment Coordination

## **Enrollment Impact**

The Task Force used the strategy action plans to build a model including enrollment baselines, strategy and plan level enrollment projections, expected SEP costs and revenue, and enrollment targets through 2023-24. Those model projects have the following impacts:

- Overall enrollment of 38,477 in Fall 2023 (33,066 undergraduates, 4,627 graduates, and 784 post-bacs).
- \$12.85 million in additional tuition revenue in 2023-24.
- \$5.37 million in additional fee revenue in 2023-24.
- A cumulative five-year return on investment (additional tuition and fee revenue less expenses) of \$42.54 million.
- A set of initial strategies that are revenue positive on an annual basis in Year 1 of the plan (2019-20) and cumulatively in Year 2 (2020-21).

While the first phase focuses on process improvements, subsequent SEP work, much of it already underway, will focus more on academic program opportunities, the downtown campus initiatives, online learning and graduate education. UTSA's SEP and the goals associated with its strategies will evolve.

Preliminary evidence suggests considerable growth opportunities for academic programs in engineering, science, education, and business. Additionally, the opportunities generated through the downtown campus and online initiatives will also spur enrollment growth. With current implementation model projects and the addition of new projects already under development, enrollment will reach 40,000 by Fall 2023. The continued work across campus with current and future projects over the next ten years will result in more than 45,000 students at UTSA by Fall 2028.

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## UTSA's Strategic Planning Process

During the 2017-18 academic year, President Taylor Eighmy launched a strategic planning process to provide a pathway for the university to reach new levels of excellence over the next decade. Several components were put into place over the course of the year to provide the framework.

### Strategic Themes

As a starting point, [six strategic themes](#) were identified and shaped through discussions with faculty, staff and students. The themes provided a common understanding of institutional priorities and the vision for UTSA's future.

#### SIX STRATEGIC THEMES

- THEME 1:** A Great Multicultural Discovery Enterprise
- THEME 2:** An Exemplary Urban-Serving University of the Future
- THEME 3:** World Engaged
- THEME 4:** UTSA will Foster Exceptional Student Experiences
- THEME 5:** Cultivating the Excellence of our People
- THEME 6:** Operational and Infrastructure Excellence

### Peer Models of Excellence

To help benchmark UTSA's progress, UTSA identified ten institutions to serve as [peer models of excellence](#). Selected for their aspirational qualities, UTSA is emulating their strategies and best practices throughout the strategic planning process.

#### UTSA's PEER MODELS OF EXCELLENCE

Arizona State University	University of California, Irvine
Florida International University	University of California, Riverside
George Mason University	University of California, Santa Cruz
Georgia State University	University of Central Florida
Portland State University	University Maryland, Baltimore County

## Key Performance Indicators

A set of Key Performance Indicators (KPIs) pinpoint UTSA's goals and facilitate progress assessment. Five and 10-year targets have been set for each KPI, driving operational awareness toward common goals.

### UTSA'S KEY PERFORMANCE INDICATORS

Total enrollment	Undergrad degrees awarded
First-Year retention rate	MS degrees awarded
4- and 6-Year graduation rates	Ph.D degrees awarded
Freshman in the top 25% of their class	Student-to-faculty ratio
Number of faculty	Student debt
Faculty awards	Endowment
Faculty in national academies	Annual giving
External review of faculty in Ph.D programs	Endowed chairs
Restricted & total research expenditures	Strategic partnerships
Administrative cost	Bond rating
	New construction

## Initiatives

Three major initiatives launched in the fall of 2017: [Student Success](#), [Strategic Enrollment](#) and [Finance and Budget Modeling](#). The task forces and consultants for each of the three initiatives worked closely together to ensure alignment given their multiple interdependencies.

## Destinations

In the fall of 2018, UTSA's strategic planning framework evolved to sharpen the focus on what kind of institution the university will become in the decade ahead. Based on input from internal and external stakeholders, as well as the UT System Board of Regents, UTSA has three overarching destinations that point us to the future.

### DESTINATIONS

- UTSA will be a model for student success
- UTSA will be a great public research university
- UTSA will be an exemplar for strategic growth and innovative excellence

# An Overview of Strategic Enrollment Planning

## Definition

There are many definitions of SEP in the literature. Ruffalo Noel Levitz has developed the following definition.

Strategic enrollment planning is a data-informed, dynamic, and continuous process that identifies, evaluates, and modifies strategies and enrollment goals that effectively address the following elements:

- How the institution serves students, both currently and in the future;
- The institution’s mission, goals, and capabilities; and
- A changing marketplace and environment.

SEP informs and is informed by the institutional strategic plan and other institutional planning efforts. It is a complex and organized effort to connect mission, current state, and changing environment to long-term enrollment and fiscal health.

## Difference from Traditional Planning

- Traditional planning permits the setting of goals, either short-term or long-term, and then the development of steps to achieve those goals.
- Strategic planning aligns the organization with its environment in order to help ensure stability and excellence. Goals are a product of that alignment.

## Characteristics of a Successful Strategic Enrollment Plan

Most successful strategic enrollment plans have the following characteristics:

- Data-informed strategies, goals, and objectives;
- A solid resource/fiscal plan to support each strategy, goal, and objective;
- Accountability (e.g., scorecards, dashboards, position responsibility) to monitor progress;
- The planning process and the results are more important than the plan itself;
- Well-written summaries of the plan are more important than long, detailed, boring plans; and
- Continuous evaluation and modification of the plan.

## Ruffalo Noel Levitz Approach to Strategic Enrollment Planning

Ruffalo Noel Levitz suggests four stages, which are interactive and have feedback loops:

1. Data collection and analysis
2. Strategy ideation and action plan development
3. Goal setting
4. Implementation and continuation

The following outlines the suggested components of all four phases of SEP.

### Stage 1 –Data Collection and Analysis

- Preparation
  - Identify the primary contact and the initial participants.
  - Educate participants on suggested SEP principles and phases.
  - Determine who will participate in the remaining phases.
- Data collection
  - Review the data that may be useful to the project. Determine what data are already available and what data need to be collected.
  - Create a shared drive/file to store all data in folders by topical areas for use by SEP participants.
  - Develop a process to respond to subsequent data requests.
- Establish SEP planning assumptions
- Definition of key performance indicators (KPIs)
  - Align enrollment planning with institutional mission and vision.
  - Establish enrollment-related KPIs that will drive the SEP.
- Conduct an in-depth situation analysis for each focus area that:
  - Provides an assessment of the current and projected strengths, weaknesses, opportunities, and threats that form the context for the development of potential enrollment strategies;
  - Is supported by both quantitative and qualitative data as well as the views of experienced environmental observers;
  - Uses data to establish both historical trends and competitive context relative to the focus area;
  - Effectively blends narrative description with the visual representation of data; and
  - Connects the SWOTs and the context in which they exist with potential actions and outcomes (especially the SEP KPIs).

### Stage 2 – Strategy Ideation and Action Plan Development

- Strategy ideation
  - Identify strategies that emerge from the context established in the situation analyses and that have the greatest potential for optimizing the KPIs.
- Action plan development
  - Provide narrative descriptions of each plan.
  - Identify the actions, responsibilities, and timelines required to execute each plan.
  - Develop evaluation and assessment elements for each plan.
  - Project enrollment impacts for each plan.
  - Develop thorough budgets for each plan.
- Strategy prioritization and ROI considerations

- Prioritize potential strategies based on expected return offset by financial and human resource investments and risk considerations.

### **Stage 3 – Goal-Setting**

- Enrollment projections
  - Roll-up strategy-level impacts into a plan model that allows for the consideration of various duplication and risk scenarios.
  - Select strategies in a combination that maximizes return on investment (ROI) and optimizes KPIs.
- Goal setting
  - Develop enrollment baselines to use in goal-setting.
  - Add the enrollment and financial impacts of the plan to the baselines to set enrollment goals.
- Finalize the initial written plan
- Identify the resources required to execute the plan and craft the strategy to fund the SEP.

### **Stage 4 – Implementation**

- Establish scorecards to measure KPIs.
- Communicate the SEP to internal and external stakeholders.
- Task an SEP leadership team to oversee the effective implementation, monitoring, evaluation, assessment, and modification of the initial strategy mix and to ensure the continuation of the SEP process.

## Strategic Enrollment Task Force

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 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.

### Task Force Members

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Chair

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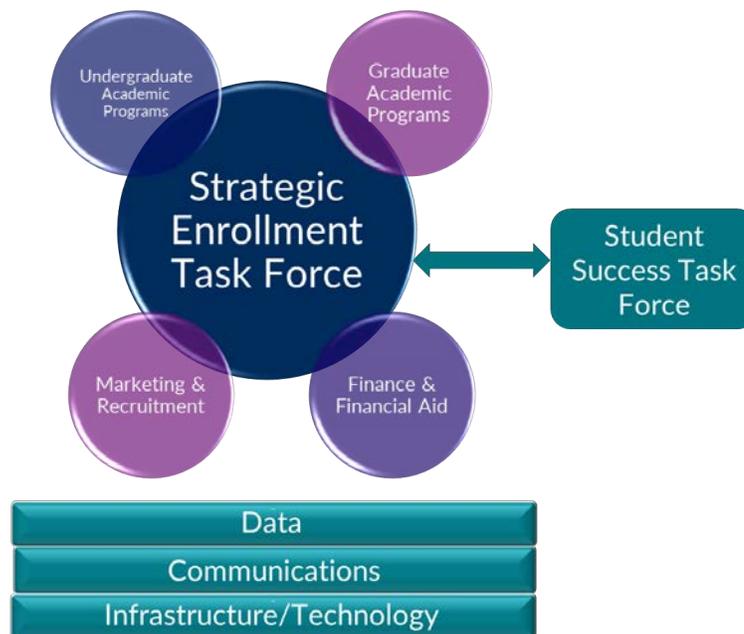
*Ex-Officio  
Provost and Vice President for Academic Affairs*

**Kathy Funk-Baxter**

*Ex-Officio  
Vice President for Business Affairs*

## Organization

For good strategic enrollment planning, it is essential to bring the right people together and organize them efficiently. The graphic here illustrates the organizational structure UTSA determined best for the project.



Dr. Lisa G. Blazer chaired the Strategic Enrollment Task Force and directed that group in the leadership of the SEP process. The chairs of the four working groups (undergraduate academic programs, graduate academic programs, marketing and recruitment, and finance and financial aid) and the chair of the Student Success Task Force serve on the Task Force. The composition of the working groups is such as to maximize existing campus expertise and to ensure broad participation.

The three bands below the structure indicate foundational elements that support the entire process.

1. **Data:** Data collection tasks for the project are substantial, and new data requests from the working groups were coordinated by the Task Force through its data team. Steve Wilkerson was a member of the Task Force and served as the SEP data lead, but many others involved in data collection for SEP acted in a support function and did not sit on either the Task Force or one of the working groups.
2. **Communications:** Internal campus communication is essential to the success of the SEP project. The Task Force kept the campus community informed of SEP activities, and the members of the campus community have had opportunities to provide input into the project.
3. **Infrastructure/Technology:** No one individual on the Task Force served as a point person for this support function, but several members of the Task Force have facilitated connections between members of the Task Force, working group participants, and others on campus.

While Dr. Blazer and the Task Force provided leadership to the SEP process, President Eighmy, in consultation with his senior leadership team, provided executive oversight to the project and made the final decisions on the Task Force's recommendations for plan priorities.

### **Coordination with Other Strategic Initiatives**

A great strength of the SEP process at UTSA is how it intentionally connected to the other strategic planning efforts on campus. The Student Success Task Force was involved in SEP as a working group, and a number of the Strategic Enrollment Task Force and SEP working group members also served on the Finance and Budget Modeling Task Force, the Weighted Student Credit Hour Optimization Committee, and the Tuition and Fees Committee. Can Saygin and Elvira Jacquez represented the President's Office on each Task Force and actively linked the work of the Task Forces, the Task Force chairs, UTSA's consulting partners, and the use of data in support of each process.

## SEP Visit Schedule and Timeline

Our Ruffalo Noel Levitz consultant has partnered with us in the development of UTSA's SEP, and his visits to campus have helped to focus the work of the Task Force and others engaged in strategic enrollment planning.

Dates	SEP Stage	Objectives/Focus
November 7-8, 2017	Stage I	SEP process discussion with leadership; solidify organization; identify preliminary planning assumptions and KPIs; review data needs; set the stage
Between visits: Task Force and leadership confirm working group composition, planning assumptions, and preliminary KPIs; make arrangements for conference-style launch; continue data collection		
December 5-6, 2017	Stage I	Conference-style launch of SEP process with working groups; SWOT identification; prepare for situation analysis
Between visits: Working groups prepare situation analyses in their respective focus areas; identify potential SEP strategies to action plan		
January 24-25, 2018	Stage I and Stage II	Situation analysis review; initial strategy ideation; action planning organization
Between visits: Working groups and/or strategy teams action plan possible SEP strategies; Joint Task Force considers the SEP strategies as part of UTSA's larger strategic planning efforts		
February 7, 2018	Strategic enrollment diagnostic with senior leadership and deans	
March 6-7, 2018	Stage II	Strategic enrollment diagnostic; action planning workshops
Between visits: Working groups and/or strategy teams action plan possible SEP strategies; Joint Task Force considers the SEP strategies as part of UTSA's larger strategic planning efforts		
March 26, 2018	EAB-RNL joint meeting	
April 3-4, 2018	Stage II	Action plan review
Between visits: Working groups and/or strategy teams revise action plans with feedback from previous reviews		
April 25-26, 2018	Stage II and Stage III	Action plan review; strategy prioritization/plan formation
Between visits: Working groups and/or strategy teams "button up" initial strategies; SEP consultant builds enrollment, revenue, and expense models		
May 22-23, 2018	Stage II and Stage III	Strategy prioritization/plan formation; implementation
Between visits: Task Force and leadership finalize initial SEP strategy set and draft the written plan; prepare for implementation; identify ongoing SEP leadership team		
September 2018	Stage IV	Implementation

# Mission, Vision, Planning Assumptions, and KPIs

## Mission and Vision

While it is not within the purview of this process to revise the university's mission or recast its vision, it is important that strategic enrollment planning align with the mission and vision. For that reason, the Strategic Enrollment Task Force and the Senior Leadership Team began this process with a review and discussion of UTSA's mission and vision and an agreement that the mission, vision, and core values are consistent with who UTSA is as an institution.

## Planning Assumptions

Early in the SEP project, it was important to develop a set of planning assumptions to help frame the work. The following is a list of the planning assumptions agreed upon by the Strategic Enrollment Task Force and the Senior Leadership Team.

- There will continue to be growth in the number of high school graduates in Texas.
- SEP will consider both the Main Campus and the Downtown Campus.
- Ours is a highly competitive environment for enrollment.
- SEP will consider opportunities that extend beyond Texas.
- SEP will reconsider admission criteria at the University and college level.
- Transfer students represent a significant portion of UTSA enrollments, and transfer enrollment growth is important.
- Each SEP strategy should be revenue aware.
- UTSA serves a high-need population.
- SEP informs and should be informed by other institutional planning efforts.
- SEP will be aware of the needs of traditional and lifelong learners.
- SEP will consider a variety of instructional delivery modalities.
- SEP will consider UTSA's role as a Hispanic Serving Institution (HSI).
- SEP will consider UTSA's heavy first-generation population.
- SEP will consider UTSA significant military and military family population.
- SEP will need to consider the multicultural discovery enterprise, urban-serving, and world-engaged themes.
- SEP will consider UTSA's large part-time enrollments.
- UTSA has reached its on-campus housing capacity on Main Campus.
- SEP should not assume increases in state funding.
- SEP should not assume significant increases in tuition rates.

- SEP will consider how to enhance UTSA’s brand position.
- SEP will lead to an optimal mix between graduate and undergraduate enrollments.
- SEP will consider the changing demographic profile of our students.
- SEP will be responsive to changes in instructional technology and materials.
- SEP will be consistent with UTSA’s mission, vision, and values.
- Increases in enrollment through SEP will necessitate investments in faculty lines.
- San Antonio is a working-class city with a relatively small corporate base.
- SEP will consider graduate student success, development, and quality of life.
- SEP will deal with our “unfinished business.”
- SEP will consider international students.
- SEP will consider DACA students.
- SEP will be sensitive to the differences in needs between undergraduate and graduate students.
- SEP will consider potential enrollment pathways between K-12, undergraduate, and graduate programs.
- SEP will consider the student perspective in strategy development.
- Faculty engagement is a critical factor in student retention, persistence, and graduation.

### **Key Performance Indicators (KPIs)**

The SEP key performance indicators (KPIs) are those critical metrics – the “big rocks” - that strategic enrollment planning is designed to move. All SEP initiatives should have an impact on one or more KPIs. KPIs are critical to the university’s mission, and they are foundational in determining the current state of the institution. Positive changes to the KPIs cannot be accomplished by a single unit or division. Instead, they require broad, cross-departmental cooperation. The following are the SEP KPIs on which the Task Force agreed and which Cay Saygin incorporated into the university’s larger list of critical performance metrics.

- Total enrollment
- First Year Retention rate
- 4 – and – 6 Year Graduation rate
- Student academic profile – Freshmen in the Top 25%
- Degrees awarded – undergraduate, graduate, PhD
- Student loan debt

## SEP Phase I

### Focus of SEP Phase I

The first phase of UTSA's SEP focuses on shoring up basic undergraduate enrollment functions and accomplishes the following:

- Identifies and addresses important needs in enrollment functional areas.
- Develops process improvement strategies critical to sustainable enrollment growth.
- Makes important cross-institutional linkages that allow for necessary collaboration and essential coordination.

By design, Phase I does not include:

- Student success and retention strategies
- New academic programs or program expansion
- Downtown initiatives
- Graduate education
- Online education
- College-level enrollment targets
- Geographic enrollment targets

The Strategic Enrollment Task Force, Student Success Task Force, and action planning teams have already begun work in many of these areas and they will be incorporated into subsequent phases of UTSA's SEP, in some cases as early as fall 2018.

### Phase I Strategies

The Strategic Enrollment Task Forces recommended eight strategies for immediate implementation as part of UTSA's SEP Phase I. President Eighmy and the Senior Leadership Team approved the Task Force's recommendation and agreed to fund all eight strategies. The Phase I strategies include:

#### CRM Solution

A major theme of the Phase I SEP discussions has been the absence of a customer relationship management (CRM) solution. CRM solutions allow universities to maintain student data and interactions in a single system, facilitating the development of relationships with students and allowing for the prioritization and segmentation of recruitment and retention activities. Effective CRM use is absolutely essential to sustained enrollment success in the current higher education marketplace. This strategy will result in the procurement and implementation of a CRM solution. While the CRM infrastructure will consider the entire student life cycle, the first phases of implementation will focus on recruitment activities, including prospect and inquiry management, case management, funnel reporting, and automated communication campaigns.

### Dual Enrollment

This strategy intends to create a first-time freshmen enrollment pipeline from the Early Bird dual enrollment program. Early Bird enrollment has increased substantially in the past year, and the number of students is expected to more than double by Fall 2018 and double again by Fall 2019. The Early Bird model differs from most dual enrollment models in that courses are taught by UTSA faculty on UTSA's campuses. This approach ensures a level of rigor consistent with university standards and provides students with a real college-going experience. Additionally, a robust supplemental instruction program supports student success, and a college readiness program helps prepare students for successful high school-to-college transitions. The action plan calls for the addition of Early Bird instructors, the addition of supplemental instructors, further exploration of possible pathway programs (similar to the new dual enrollment cybersecurity cohort), and improvements to the outreach, recruitment, and onboarding processes.

### Financial Aid Leveraging

This strategy calls for the development of an econometric model that will allow UTSA to maximize the impact of its institutional scholarship and financial aid resources. Using the model, UTSA can better understand how changes in gift and need aid will affect individual student decision-making, and the university can more precisely align its scholarship and financial aid strategy with its larger institutional enrollment goals. Weekly analytics from the model can also suggest and inform any necessary mid-cycle adjustments and help target recruitment activities to "soft" spots in the model. Use of the model will also allow UTSA to strengthen student retention by developing an awarding strategy that encourages persistence and completion, not just initial enrollment.

### Online Self-Service Improvements

This strategy aims to dramatically improve the look and functionality of online self-service for students. The current tool, ASAP, is built on the Banner self-service platform that many of UTSA's peers have used to create visually pleasing and highly operational interfaces. However, a lack of governance and thoughtful infrastructure development has rendered the UTSA tool visually unacceptable and difficult to navigate. There have also been some missed opportunities to integrate self-service functions that would reduce the burden on staff and students alike. The action plan calls for a thorough assessment of current online self-service needs, a standing group to govern the self-service platform, integration of as many self-service functions as possible into the platform, and the complete redesign of the student interface. Not only will this strategy improve service for those using the tool, it should reduce the lines and wait times for those in need of face-to-face service, thereby improving the overall customer service experience.

### Prospect and Inquiry Management

UTSA has considerable opportunity to improve its management of prospect and inquiry data, to build relationships with prospective students earlier in the cycle, and to enhance the recruitment of students at the top and middle of the funnel. The strategy develops robust, segmented, and heavily messaged communication flows to prospects and inquiries with the intent of building demand and increasing applications from students for whom UTSA is a good fit.

### Transfer Student Recruitment

Transfer students represent a significant portion of UTSA's enrollment, but UTSA's current recruitment plan for transfers lacks the intentionality necessary for sustained enrollment growth. This action plan calls for the implementation of EAB's Transfer Portal, the creation of clear transfer plans built on existing articulations, the development of new articulations, and credit evaluations at the point of inquiry. The strategy will also result in stronger transfer inquiry and application management, a transfer-specific communication flow, multi-channel

marketing efforts that target transfers, enhanced outreach to community college partners, and modifications to the transfer scholarship program.

### **Undergraduate Scholarship Management**

Currently, UTSA does not adequately leverage its scholarship resources to impact student decisions to enroll at UTSA or to stay at UTSA. This strategy seeks to coordinate scholarship processes in a way that allows for colleges and departments to maintain the necessary decision-making authority but according to a much earlier timeline that allows students to receive notifications of these awards as part of their initial aid packages. Academic Works, the scholarship management software recently purchased by UTSA, is central to the implementation of this strategy as is collaboration between the development office, colleges, and the central enrollment units.

### **University-Wide Recruitment Coordination**

This strategy seeks to align the undergraduate recruitment efforts across the university to maximize resources and impact. Some of the plan highlights include: the identification and coordination of recruitment and outreach activities across the university; the alignment of recruitment and admissions goals and priorities; a central recruitment coordinating body; college and program-specific recruitment goals; college-based recruitment staff; the establishment of best practices in recruitment at the college-level; enhanced high school counselor outreach; common data standards for student inquiries and improvements in data and information sharing; leveraging K-20 pipelines and summer programs as enrollment streams; improved campus visit experiences; enhanced communication flows; use of a CRM solution; and better education of faculty and staff on recruitment and admissions issues and practices.

## **SEP Phase I Implementation Model**

We used the strategy action plans to build the Phase I SEP implementation model that includes enrollment baselines, strategy- and plan-level enrollment projections, expected SEP costs and revenue, and enrollment targets through 2023-24. At the strategy level, we calculated revenue using only tuition. We added in the revenue associated with fees at the plan level so we can see the overall financial impact of the Phase I strategy set. The Phase I implementation model is attached as an appendix to this report and projects the following:

- Overall enrollment of 38,477 in Fall 2023 (33,066 undergraduates, 4,627 graduates, and 784 post-bacs).
- \$12.85 million in additional tuition revenue in 2023-24.
- \$5.37 million in additional fee revenue in 2023-24.
- A cumulative five-year return on investment (additional tuition and fee revenue less expenses) of \$42.54 million.
- A set of initial strategies that are revenue positive on an annual basis in Year 1 of the plan (2019-20) and cumulatively in Year 2 (2020-21).

## SEP Phase II

The Strategic Enrollment Task Force and the action planning teams the Task Force has designated have identified the following potential Phase II SEP strategies:

- New academic programs/program expansion
- Downtown initiatives
- Course management
- Finance messaging
- Graduate recruitment and admissions
- Graduate student funding
- High school counselor outreach
- International recruitment
- Online learning strategy
- Out-of-state recruitment
- Summer enrollment
- University-wide recruitment marketing coordination
- Work-study program modifications

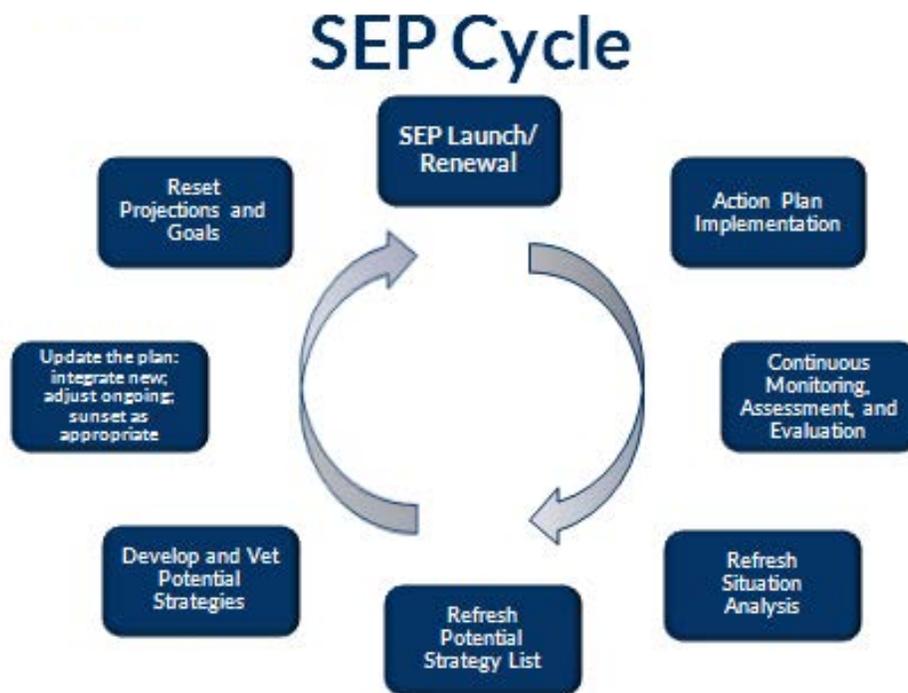
Work has already begun on many of these strategies, and as action plans for these strategies are developed, they should be vetted by the Strategic Enrollment leadership, considered by the Senior Leadership Team, and if approved, folded into the SEP implementation model.

## Evolving Strategic Enrollment Plan

With a first phase focused on process improvements and several program and market development strategies in the works for the second phase, UTSA's SEP and the goals associated with its strategies will evolve. Preliminary evidence suggests considerable growth opportunities for academic programs in engineering, education, science, and business. Additionally, the opportunities generated through the downtown campus and online initiatives will also spur enrollment growth. The current implementation model projects enrollment over 38,000 by Fall 2023. With the addition of other strategies, it is likely that number will push closer to 40,000 in future iterations of this five-year plan. Looking further out, it is conceivable that UTSA could see enrollments in excess of 45,000 students by Fall 2028. With considerable enrollment growth on the horizon, the university needs to give careful consideration to capacity, account for capacity investments in the evolving SEP, and build capacity "trip wires" into the plan when possible.

## Implementation and Continuation of the SEP process

We began this process with the understanding that, to be successful, a strategic enrollment plan must be a “living” tool. The faculty and staff at UTSA have done excellent work in building a strong first phase of SEP, and they are committed to moving that process forward in a dynamic way. The following visual provides a useful way to think about the on-going SEP process.



## **SEP Implementation and Governance**

With the implementation of the first SEP phase and continued work on subsequent phases, the Interim Vice President for Strategic Enrollment, will establish a Strategic Enrollment Leadership Council (SELC) as part of an overall governance structure. The SELC will be made up of the Interim Vice President for Strategic Enrollment, the Provost and Vice President for Academic Affairs, The Interim Vice President for Student Success and members of the Dean's Council. The SELC will continue with the following responsibilities:

- Ensure the implementation of SEP strategy action plans
- Evaluate and assess SEP strategies
- Modify and update the SEP
- Continue to survey the landscape with an eye toward future SEP strategies
- Engage the expertise and perspectives of others at the institution in strategy identification
- Manage the development, vetting, and implementation of new SEP strategy action plans
- Keep stakeholders informed of SEP activities, successes and failures, and the SEP's connections to other institutional planning efforts

In addition to the SELC, working groups designated to various topics including Recruitment, Marketing, Finances/Financial Aid, Academic Program Development along with the Student Success (get from Rhonda's report) will continue implementation of Phase One projects and developing action plans for future SEP phases.



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