

# Establishing Planning Assumptions

Establishing Planning Assumptions, Creating Strategies and Action Plans: How the research and data feed into the strategies

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### Noel-Levitz Phases of Strategic Enrollment Planning

1. Preparation
2. Key Performance Indicators (KPI) identification
3. Situation analysis and assessment
4. Strategy development
5. Action and support plan development (potential investments)
6. Prioritization of strategies and actions based on readiness and attractive ROIs
7. Quantifiable goal and ROI identification
8. Plan evaluation and modification

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Working Committees, Task Groups, and Planning Assumptions



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# Establishing Planning Assumptions

## Working Group Activities Focus

- Ensure our focus remains connected toward supporting strong academic outcomes
- Strengthen the college/university through providing strategic direction that is data-informed
- Unify approach and vision of enrollment management
- Remain data-informed and seek ways to further enhance and integrate data and data collection into the planning processes
- Maintain enrollment and seek to maximize your profile
- Diversify your campus profile
- Provide long-term, practical, and tangible plans that are executed

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## Planning Assumptions



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## Examples of Planning Assumptions

- Strategies and tactics are focused on undergraduate enrollment.
- The state funding formula will likely decrease, requiring the college to supplement funding through additional internal means (retention, hybrid or online delivery, growth in graduate programs).
- There is to be no or very minimal (less than 1%) growth in the freshmen class.
- Mission, vision, and strategic plan will serve as the foundation for strategies and action items creation.
- All initiatives must have a focus on increasing retention and graduation/completion rates using federal and state requirements as the guidelines for measurement.
- Increasing diversity and maintaining or increasing retention and completion rate of diverse students remains a top priority.
- While capacity is an issue, the college must explore through this process alternative delivery methods to maximize resources and provide additional funding sources.

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# Establishing Planning Assumptions

**Key Enrollment Strategies**  
Connect to ...

**Purpose and Identity** (i.e., strategies related to more effective realization and illumination of mission and distinctiveness).

**Product and Institutional Effectiveness** (i.e., strategies related to development/enhancement of academic programs and courses, co-curricular programs, personnel related to these programs, and other student success/retention/graduation initiatives).

**Promotion and Recruitment** (i.e., strategies related to development/enhancement of marketing and student recruitment).

**Place and Program Delivery** (i.e., strategies related to development/enhancement of program and course-delivery innovations/options [e.g., off-site, online, and executive format strategies] and physical plan improvements).

**Price and Revenue** (i.e., strategies related to tuition, fees, financial aid and scholarship policies, and revenue building).

**Process** (i.e., strategies related to strengthening data-informed decision-making, coordinating systems and processes [including the integration of planning, budgeting, and assessment], and fostering campus engagement and learning).

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**Overarching Strategies**

- Shape the quality of the incoming class
- Build strong student success-related practices
- Remain fiscally strong
- Expand market share through transfer, graduate, online, contemporary, and non-traditional programs and services
- Build the brand of the university embedded in institutional values
- Match program offerings with program demands
- Connect initiatives to strong academic outcomes

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Exercise:  
Best Practices



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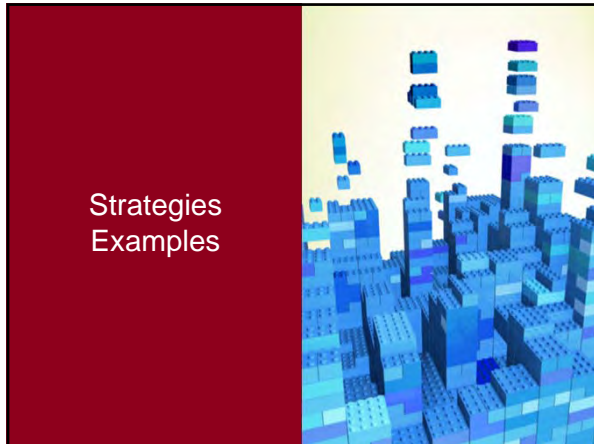
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# Establishing Planning Assumptions



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**Recruitment**

- Shape the profile of the incoming class
- Enhance internal processes
- Create processes for students enrolled in online programs
- Maximize recruitment efforts
- Build your institutional brand
- Integrate technology

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**Finance/Financial Aid**

- Optimize net revenue strategies
- Target programs with larger program capacity
- Establish tuition planning processes
- Develop a matrix to increase transfer students
- Support endowment and specific scholarship development opportunities

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# Establishing Planning Assumptions

## Satellite Site

- Develop degree programs
- Create curricular support to match degree program offerings and delivery mode
- Integrate enrollment management processes
- Align operational policies between campuses
- Create technical, data, and instructional support

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## Graduate

- Create organizational efficiencies
- Refine recruitment efforts and target specific programs for growth
- Create efforts to retain students to degree completion
- Deliver degree programs in online and hybrid formats
- Increase international graduate students

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## Retention

- Create a campuswide retention plan
- Use technology to support university student success efforts
- Support students through university services
- Engage students through co-curricular opportunities
- Provide appropriate curricular pathways for students to complete their degree on time (two years, four years)

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# Establishing Planning Assumptions

## Marketing

- Develop a marketing plan to support your recruitment efforts
- Develop a marketing plan for a satellite campus
- Implement targeted marketing strategies to match academic demand study areas (graduate and undergraduate)
- Enhance technology that builds your institutional brand and identify

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## Distance Education

- Offer XX additional programs online by fall 2011
- Provide multiple general education sequence options
- Review policies and procedures related to enrollment practices
- Create a long-term academic program delivery plan

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## Technology

- Conduct an ongoing usage analysis
- Enhance e-communications
- Develop social media strategies
- Increase Web site development
- Improve search engine marketing and optimization

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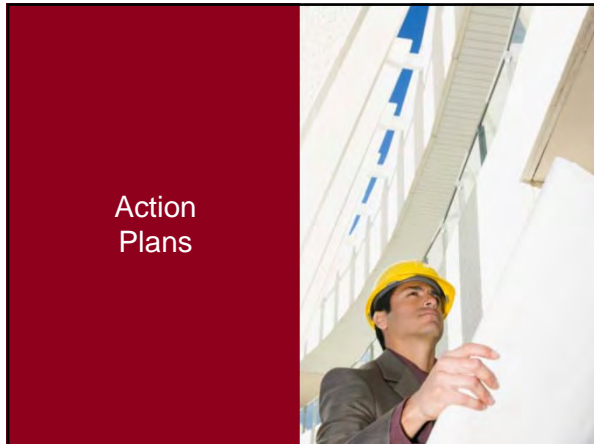
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# Establishing Planning Assumptions



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**Action Plans**

- Link to an overarching strategy
- List action items
- Explain the action items if necessary
- Determine effort/impact
- Identify broad tasks to be completed to accomplish the action item
- Assign responsibility and role
- Determine other departmental impact
- Plan within the budget
- Prepare assessment measures

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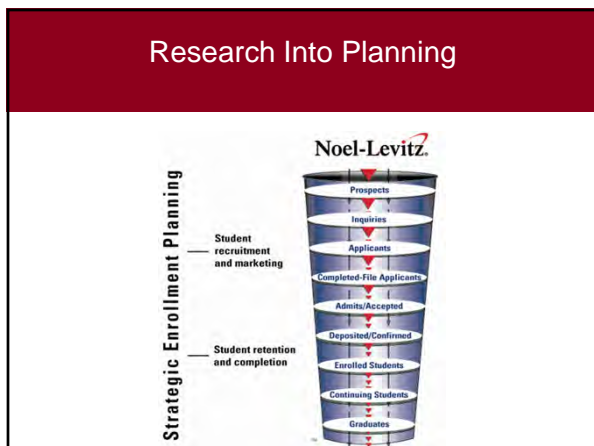
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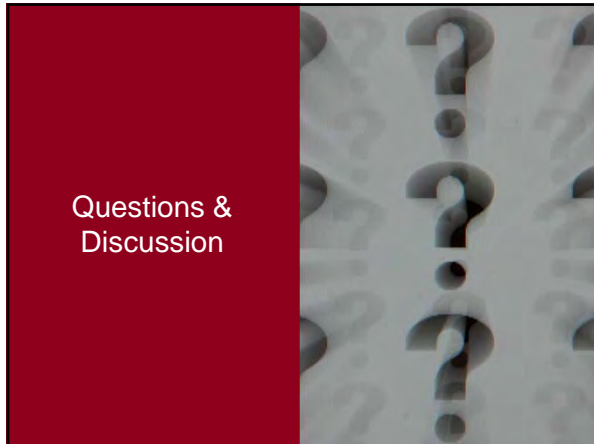
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