

The Power of the Plan: Linking Enrollment Management Goals with University Strategic Initiatives

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Widener University

SEM XVIII

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Widener University

- Private, metropolitan university
- Main campus in Chester, PA (near Philadelphia)
- Three other campuses in PA and DE
- Eight schools & colleges
- 6,500 total students, 2,500 UG full time students in the day program
- Approximately 725 freshmen and 125 transfer students in FA08
- Mean SAT of entering freshmen is 1010

Create, Connect, Complete

- Building the plans
- Connecting the plans
- Making them work

Units Involved

- Executive Team
- Senior Leadership Team
- Academic/Administrative units
- Board of Trustees
- Vision 2015 (100 members, 2/3 are faculty)
 - Ensure coordination of efforts to implement Strategic Plan
 - Focus on Middle States and school/college accreditations
 - Provide direction for capital campaign

Timeline for University Strategic Plan

- New president arrived in 2002
- Reorganization of senior staff from 8 vice presidents to 3
- University Strategic Plan – two year process chaired by Senior VP for Administration & Finance and completed in SP04

University Mission

As a leading metropolitan university, we achieve our mission at Widener by creating a learning environment where curricula are connected to societal issues through civic engagement. We lead by providing a unique combination of liberal arts and professional education in a challenging, scholarly, and culturally diverse academic community. We engage our students through dynamic teaching, active scholarship, personal attention, and experiential learning. We inspire our students to be citizens of character who demonstrate professional and civic leadership. We contribute to the vitality and well-being of the communities we serve.

University Vision

Widener aspires to be the nation's preeminent metropolitan university recognized for an unparalleled academic environment, innovative approaches to learning, active scholarship, and the preparation of students for responsible citizenship in a global society.

University Goals

- Diversity
- Unparalleled academic environment
- Student-centered
- Distinctive programs
- Manage financial resources
- Employer of first choice
- Integration of arts and sciences and professional programs
- Innovative
- Raise profile of WU
- Optimize enrollment
- Address the metro region's needs
- Leadership development
- Commitment to academic freedom

Format of Strategic Plan

- Goals
- Operational objectives
- Action Steps:
 - Desirable Outcomes
 - Criteria of Success
 - Evaluation Strategy
 - Primary Accountability
 - Schedule (Start – Completion)
 - Resources Required

Format of Strategic Plan

GOAL: OPTIMIZE THE UNIVERSITY'S ENROLLMENT TO ACHIEVE A VITAL UNIVERSITY COMMUNITY AT BOTH THE UNDERGRADUATE AND GRADUATE LEVELS.

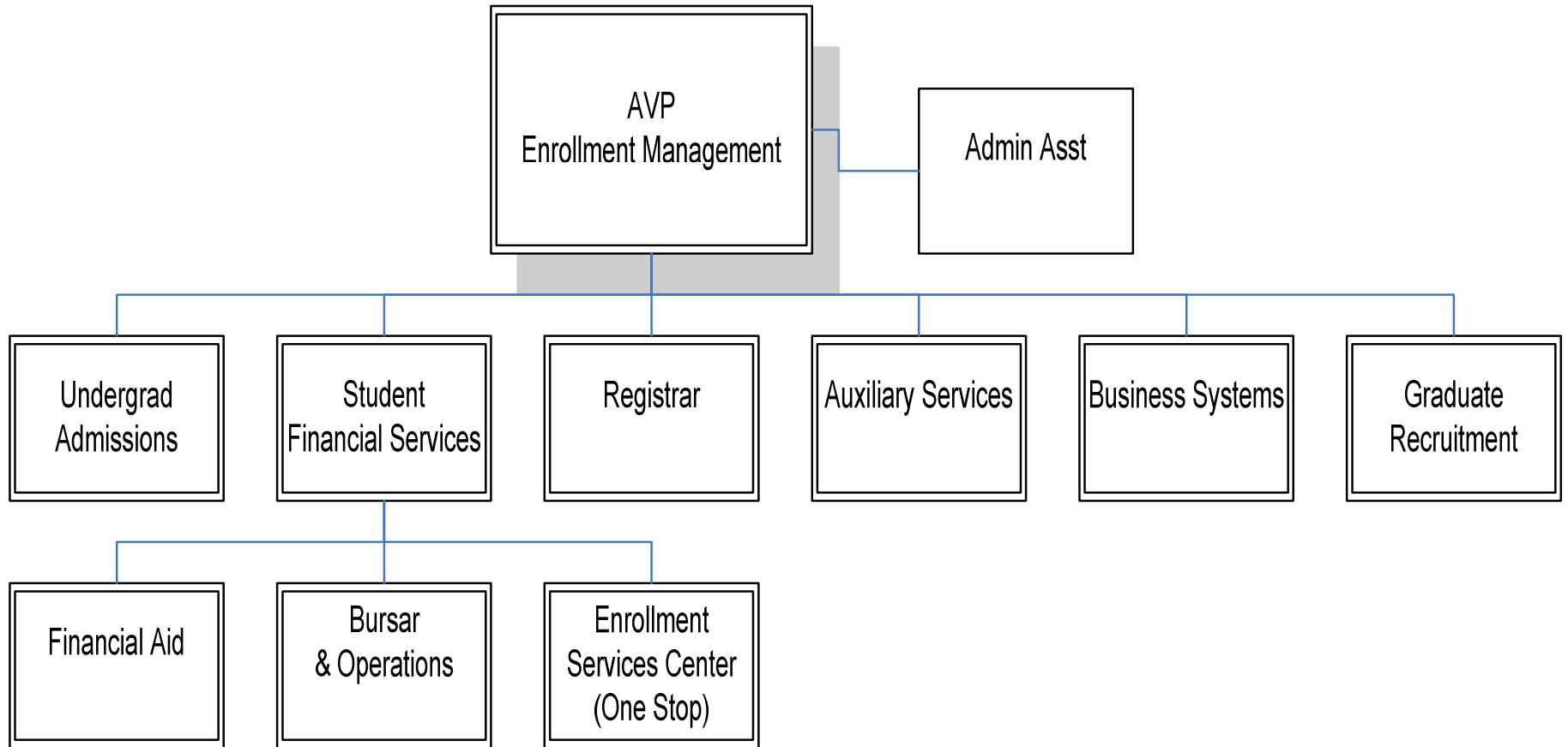
OPERATIONAL OBJECTIVE NO. 1: INCREASE FULL-TIME UNDERGRADUATE ENROLLMENT FROM 2100 STUDENTS TO 2500 STUDENTS BY FALL 2009.

ACTION STEPS	DESIRABLE OUTCOMES	CRITERIA OF SUCCESS	EVALUATION STRATEGY	PRIMARY ACCOUNTABILITY	SCHEDULE Start – Completion	RESOURCES REQUIRED
1 Develop and implement strategies to increase first-time freshman applications from 2800 to 3700 (including international students).	Larger applicant pool will facilitate larger class sizes	Increase freshman applications 5% each year	Review enrollment reports	Dean of Admissions	Fall '04 - Fall '09	\$100,000 for undergraduate advertising and recruitment each year
2 Develop and implement strategies to increase the entering freshman yield rate from 26.5% to 30%.	Accurate forecasting and trending of the number of enrolled students	Increase in matriculated students based on admitted pool	Review enrollment reports	Dean of Admissions	Fall '04 - Fall '09	Part of above
3 Develop and implement strategies to enroll 650 freshmen in Fall '05, 675 in Fall '06, 700 in Fall '07-'09.	Incremental increases in size of the entering class	Increase in enrolled students	Review enrollment reports	Dean of Admissions	Fall '04 - Fall '09	Part of above
4 Enroll 125 new transfer students each year.	Maintain transfer enrollment	Increase or maintain transfer enrollment	Review enrollment reports	Dean of Admissions	Fall '04 - Fall '09	Part of above
5 Manage net tuition revenue to an increase of 10% each year.	Amount of net tuition revenue increases	Reaching the goal of 10% increase in net revenue each year	Net tuition revenue and financial reports	Enrollment Management Committee, VP Administration and Finance	Fall '04 - Fall '09	Existing budget
6 Develop and implement strategies to increase the freshman retention rate to 80% and the transfer retention rate to 85%.	Continuing upper-class numbers will increase	Attrition rate is lowered and a formal structure is in place to support retention goals	Review enrollment reports	Enrollment Management Committee and Senior Leadership Team	Fall '04 - Fall '09	\$25,000 for institutional research

Cascading Model

- Unit plans mandated: unit defined as those that report directly to a vice president (e.g., colleges/schools, major administrative units)
- Identify USP goals, objectives and action steps that are the responsibility of unit

Enrollment Management



Timeline for EMS Strategic Plan

- Charge to EMS Strategic Planning Committee in 10/05
 - SWOT
 - Collect data
 - Coordinate with other offices
 - Determine action steps
 - Due in April
- First draft in 4/06
- Reviewed by 14 other outside units and all units of Administration & Finance
- Submitted to Vision 2015 & Ex Team (6/06)
- Reviewed by Senior Leadership Team (7/06)
- Revised plan submitted to Ex Team (10/06)

University Strategic Plan: Foundation of EMS Plan

- Vision Statement
- Mission Statement
- 13 Goals, including
 - Create a **student-centered** living and learning experience that supports the achievement of academic excellence.
 - Expand and diversify the university's financial resources and **manage its assets** in an efficient and effective manner.
 - **Optimize the university's enrollment** to achieve a vital university community at both the undergraduate and graduate levels.

EMS Mission Statement

Our mission is to provide student-centered **customer service**, to attain **optimal student enrollments**, and to support the **mission, vision and values** of Widener University.

EMS Vision Statement

Our vision is to recruit and enroll students in **optimal** numbers and with the desirable characteristics that are in alignment with the mission, vision, core values and strategic plan of the university; to **enable students** to manage their administrative tasks easily in a supportive environment; to be a **service leader** at Widener University; and to be a **national model** for quality enrollment management services.

EMS Goals

- Optimize enrollment
- Improve retention
- Insure student-centered focus in delivery of services
- Maintain compliance
- Hire and retain trained and motivated staff

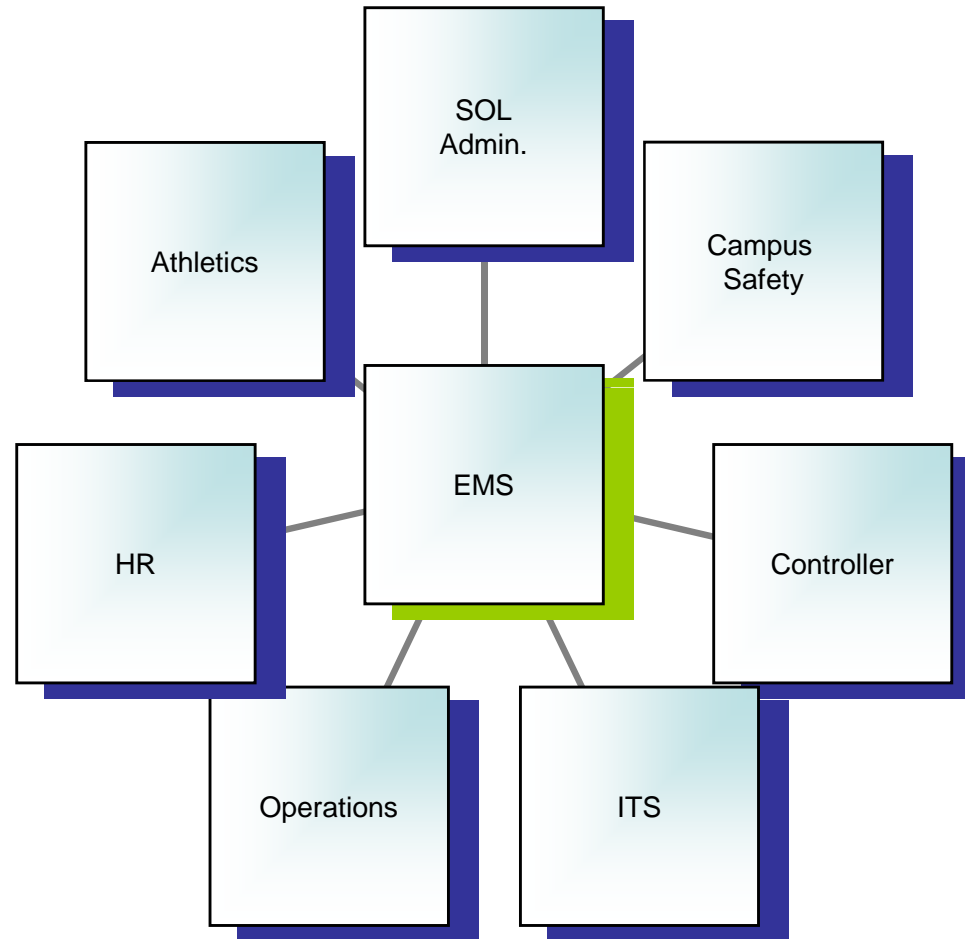
Format of Strategic Plan

GOAL: IDENTIFY, RECRUIT AND ENROLL A STUDENT BODY OF OPTIMAL DIVERSITY AND SIZE						
OPERATIONAL OBJECTIVE NO. 1: DETERMINE OPTIMAL ENROLLMENTS BASED ON MISSION, STRATEGIC PLAN, REVENUE & MARKET PROJECTIONS AND CAPACITY						
ACTION STEPS	DESIRABLE OUTCOMES	CRITERIA OF SUCCESS	EVALUATION STRATEGY	PRIMARY ACCOUNTABILITY	SCHEDULE Start – Completion	RESOURCES REQUIRED
1 Determine and begin to implement optimal enrollment for undergraduate and graduate programs for A&S, SOB, SON, SOE, SOHSP, SOH	Enrollment plan that meets projections for enrollments and net revenue	Achievement of enrollment goals in line with mission, plan and within capacity, to 2,650 full time undergrads in FA14 ; and to 2,000 graduate students (full and part time) in FA14	Review of enrollment reports, census reports	AVP Enr. Mngt. (Provost, Deans, IR)	FA08-FA14	Existing budget depending on increases
2 Increase percentage of undergraduates living on campus	Full use of residence halls	Have over 100%+ beds occupied on first day of the fall term	Housing and census reports	Director of Enrollment Services, AVP Enr. Mngt., (Asst. Dean of Housing)	FA08-SP11	Existing Budget
3 Determine optimal use of classrooms and other potential classroom space	Full use of classrooms	Maximum use of classrooms	Registrar reports	Registrar, AVP Enr. Mngt. (Deans)	FA08-FA11	Existing Budget
4 Use and refine Schedule25 to make best use of classroom space	Full use of classrooms	Maximum use of classrooms	Schedule25 reports	Registrar, AVP Enr. Mngt.	FA08-SP11	Existing Budget

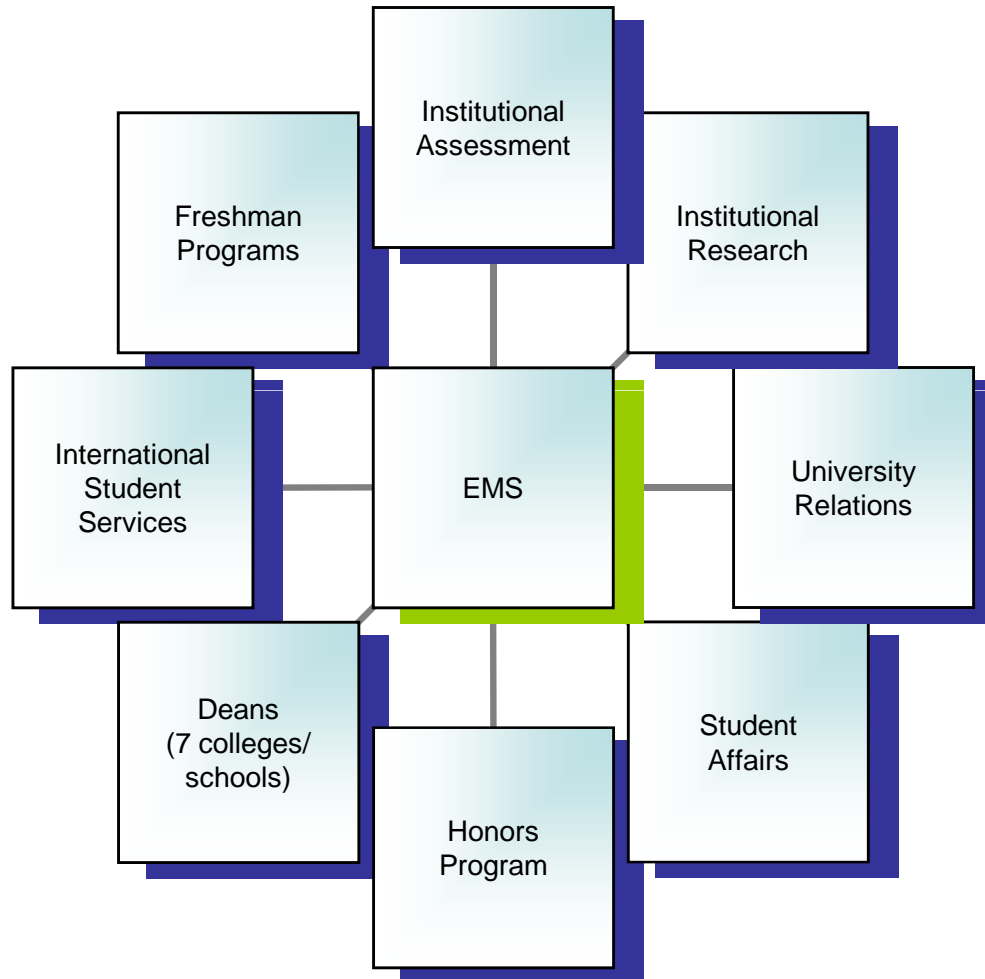
Cross Walk

- Within and between major academic & administrative units and other groups
 - Compared EMS plan with those of all other Administrative & Finance units (e.g., campus safety, operations, controller, IT, athletics, HR)
 - Shared EMS plan with units outside A&F
 - Shared EMS plan with Senior Leadership Team and received feedback on deficiencies in relationship to university plan

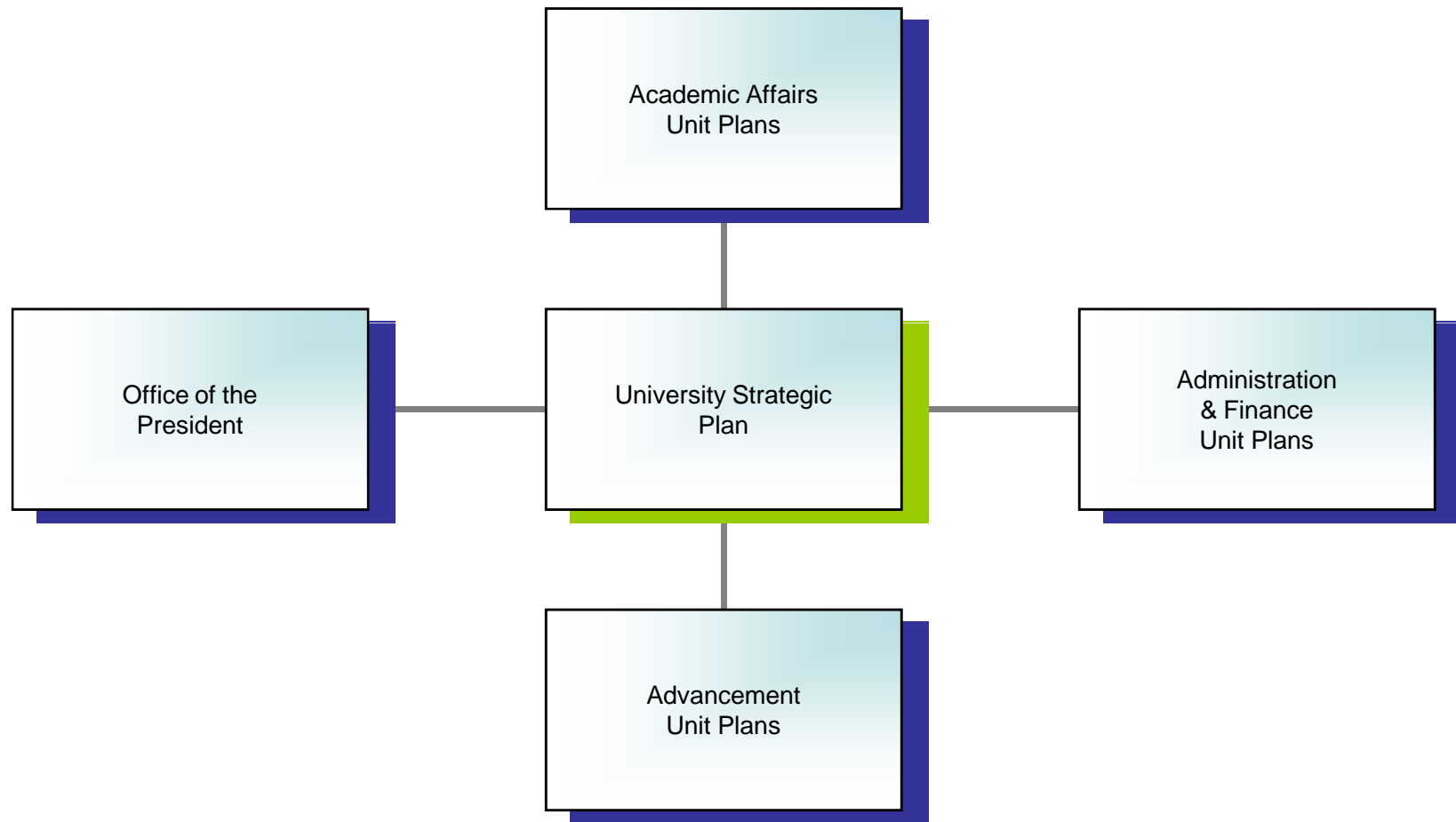
Crosswalk A&F Units



Crosswalk of EMS & Outside Units



University Crosswalk



Administration & Finance Crosswalk to University Plan

USP Goal: Enrollment	Finance	Human Resources	Athletics	Campus Safety	ITS	EMS	Controller	Operations
Obj/Act								
1-1			X			X		
1-2			X			X		
1-3			X			X		
1-4			X			X		
1-5	X					X		
1-6			X			X		
1-7						X		
1-8						X		
1-9						X		
2-1	X				X		X	
2-2	X						X	
2-3	X						X	
2-4	X						X	

Connections

University Plan

Optimize enroll.

Manage assets

Student centered

EMS Plan

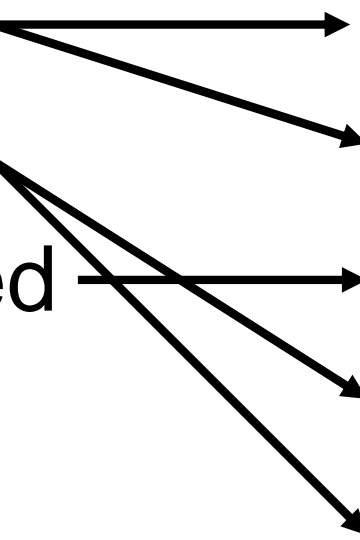
Optimize enroll.

Retention

Student centered

Compliance

Staff hiring/training



Red/Green/Yellow Light

- Quarterly basis
- Unit plans
- University plan
- Report to Board

Red/Green/Yellow Light

GOAL: IDENTIFY, RECRUIT AND ENROLL A STUDENT BODY OF OPTIMAL DIVERSITY AND SIZE				
OPERATIONAL OBJECTIVE NO. 1: DETERMINE OPTIMAL ENROLLMENTS BASED ON MISSION, STRATEGIC PLAN, REVENUE & MARKET PROJECTIONS AND CAPACITY				
ACTION STEPS	CRITERIA OF SUCCESS	PRIMARY ACCOUNTABILITY	SCHEDULE Start – Completion	COMMENTS
1 Determine optimal enrollment for undergraduate and graduate programs for A&S, SOB, SON, SOE, SOHSP, SOH	Achievement of enrollments goals to 2650 in FA09; and to 1980 in FA09	AVP Enr. Mngt. (Provost, Deans, IR)	FA06-FA10	● Fall 2007 had 2,585 full time undergraduate students; increases in undergrad SBA, SOE and SON; ● grad was 1,596
2 Increase percentage of undergraduates living on campus	Have over 100%+ beds occupied on first day of term and from 61% of FT undergraduates in FA05 (1453 of 2374) to 67% of FT undergraduates in FA09 (1801 of 2751).	Director of Enrollment Services, AVP Enr. Mngt., (Asst. Dean of Housing)	FA06-SP10	● In the fall 2007, 61% of undergraduate students were in student housing (1588/2585)
3 Determine optimal use of classrooms	Maximum use of classrooms	Registrar, AVP Enr. Mngt. (Deans)	FA06-FA10	● Schedule25 and X25 are providing reports on classroom usage; major issue is the large number of meeting patterns
4 Test and implement Schedule25 to make best use of classroom space	Maximum use of classrooms	Registrar, AVP Enr. Mngt.	FA07-SP10	● Implemented for spring 2008; have already opened scheduling for fall 2008 and spring 2009; improved overall scheduling process for freshmen;
5 Work with deans and faculty to determine market viability of new/current programs	Identify featured programs	AVP Enr. Mngt. (Deans)	FA06-SP10	● Deans and faculty are still discussing which programs will be "hallmark" programs; Enrollment Mngt is focusing on A&S, business, engineering, education, hospitality for undergrad; and business, engineering, education and nursing for grad

Top Ten Goals

- Completed on annual basis
- Top ten goals for each unit provide priorities
- Collapsed to top ten goals for Administration & Finance
- Shared accountability of all A&F units
- Only goals in the university plan are considered

Individual Goals

- Focus on university, A&F and unit
- Priority order
- Include non-strategic issues of the regular business of the university – e.g., packaging, processing applications, etc.
- Performance review
- Tied to salary increase (merit only)

Budget Allocation

- Tied to Strategic Plan of University
- Operational changes
- Capital requests
- Procedure
 - Units propose to A&F
 - A&F to SLT
 - SLT to Vision 2015
 - To Ex Team

Key Performance Indicators

- Annual goals for university plan, e.g., Optimize enrollment, Obj. 1.8: increase FT residents from 62% to 75% of undergraduate enrollment
- Annual goals for EMS plan
 - Desirable outcomes, e.g., full use of residence halls
 - Criteria of success, e.g., have over 100% of beds occupied on first day of fall term
 - Evaluation strategy, e.g., housing/census reports
- Management goals – e.g., automated reports every Friday on students assigned housing compared to same date the previous year

Has It Worked?

- Student-centered: Customer service to students has improved based on surveys
- Manage resources: Processing aid faster, getting revenue faster, revenue increasing
- Optimize enrollment: Undergraduate enrollment has increased

Lessons Learned

- Complexity of plans
 - University strategic plan overwhelming – 13 goals, 60 objectives and 285 action steps
 - EMS plan responsible for major portions of 3 university goals (and smaller parts of 2), 8 objectives, and 30 action steps
- Change of circumstances leads to confusion, e.g. housing issues
- Forces collaboration/communication

Lessons Learned

- Increased number of meetings (e.g., EMS unit meetings, A&F meetings, SLT, Vision 2015, deans' road shows, etc.)
- Transparency and communication are crucial
- Technology required, especially reporting tools
- Puts the plan foremost

QUESTIONS??

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