29TH ANNUAL
SEM
STRATEGIC ENROLLMENT
MANAGEMENT CONFERENCE

OPERATIONAL EFFICIENCY

INSTITUTIONAL WELLNESS

STUDENT SUCCESS

Grow Your **Enrollment**.
Develop Your **Career**.

November 3-6, 2019
Hilton Anatole • Dallas, Texas

Presented by: Josh Hibbard, Ph.D.

Central Washington University

November 6, 2019

9:30am – 10:30am

Introduction

- Why I'm presenting on this topic

- Learning Outcomes:

  - Understand how to develop a work plan for SEM goal implementation

  - Learn how KPIs and measurements are developed and monitored to support SEM goals

  - Gain a conceptual framework for how Slate (CRM) can be configured to support SEM goals

"The reason that everybody likes planning is that nobody has to do anything." - Jerry Brown

Timeline

- **Spring 2017** – Recognized need for a SEM plan
- **Fall 2017** – Kicked-off SEM Steering Committee
- **Fall 2018** – Submitted Plan to President
- **Winter 2019** – Plan endorsed by Trustees
- **Summer 2019** – SEM Advisory Council Formed
- **Fall 2019** - Implementation Planning Begins

Our SEM Plan (paraphrased)

- **Objective #1: Increase New Student Enrollment**

- **Objective #2: Increase Enrollment of Traditionally Underrepresented Student Groups (TUSG)**

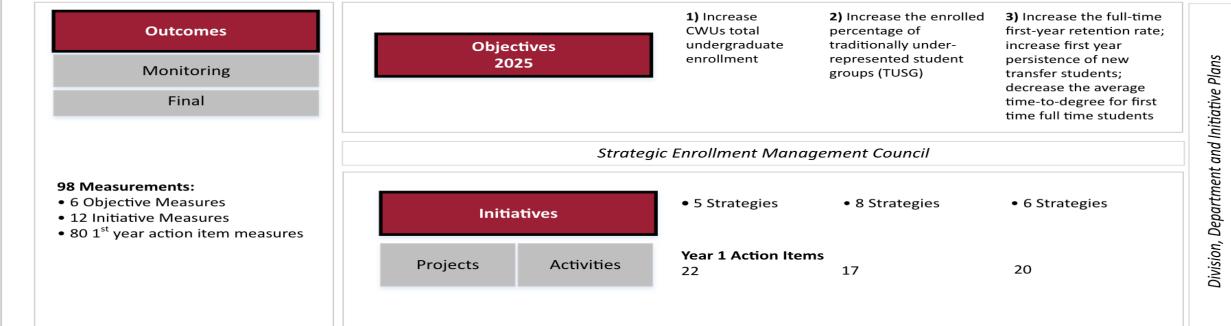- **Objective #3: Increase Retention and Persistence**

How to develop a workplan? The SEM Advisory Council

- A Council within the Enrollment Management Division, chaired by the VP
- 1 Dean, 3 Associate Provosts, 3 VPs, 1 faculty Senate Rep, 1 Dean of Students
- 4 workgroups
  - 1 for each objective, and 1 for enrollment projections

Mission	Vision

Guiding philosophies
• Core to the organization

Values

Core Themes

Broad principles
• Fulfills the Mission, Vision and Values

STRATEGIC ENROLLMENT MANAGEMENT PLAN

The Strategic Enrollment Management Plan is created for 2019-2025. Endorsed by the President and Board of Trustees, it is the result of a collaborative vision for Ellensburg Undergraduate New Student Recruitment; Persistence, Progression, and Graduation; and Centers and Online Enrollment.

Outcomes

Monitoring

Final

Objectives 2025

1) Increase CWUs total undergraduate enrollment

2) Increase the enrolled percentage of traditionally under-represented student groups (TUSG)

3) Increase the full-time first-year retention rate; increase first year persistence of new transfer students; decrease the average time-to-degree for first time full time students

Strategic Enrollment Management Council

98 Measurements:
• 6 Objective Measures
• 12 Initiative Measures
• 80 1st year action item measures

Initiatives

Projects	Activities

• 5 Strategies   • 8 Strategies   • 6 Strategies

Year 1 Action Items

22   17   20

Division, Department and Initiative Plans

SEM Plan Objective #1: Increase Enrollment

Increase CWU's total undergraduate enrollment from 11589 in fall 2018 to 14205 in fall 2025.

Initiatives (5)

Strategy 1:
Develop CWU's next generation marketing, recruitment, and campus visitation plans that expand our first-year student market share into new geographical areas while maintaining current market share. Use pre-college programs (e.g. Running Start, Game On!) as recruiting pipelines

Strategy 2:
Develop a **specific, transfer student enrollment approach**. For transfer students bound for the Ellensburg campus, create a seamless transfer transition experience. For transfers headed to a Center or the Sammamish sites, partner with community colleges and corporations to create programming that meets the unique needs of place-bound students.

Strategy 3:
Target recruiting for ready-to-grow majors well-suited for first year and degree completer student growth. Enhance existing programs and add new programs that meet market-demand and result in increased market-share.

Strategy 4:
Centers enrollment: **Establish CWU University Centers as the "go-to" choice for time and place bound degree completers**, including international students. Increase international student enrollment and market share for International online programs and from the Community Colleges in Seattle area.

Strategy 5:
Use the operations and delivery of **financial aid to optimize students' ability to enroll and pay for college**. Focus on improving the student experience, especially in the timely completion of need-based aid requirements.

Year One Focus Actions: Projects & Activities (24)

Strategy 1:
- Expand Senior Search to out of state markets
- Expand campus visitation program to increase alignment with application generation.
- Expand CRM event management and communication planning to include pre-admissions programs.
- Enhance prospective parent/guardian experience in the senior search process.
- Develop CRM and PeopleSoft integrations to increase yield
- Enhance High School Partnership Programs

Strategy 2:
- Establish competitive service response times for conducting transfer evaluations for applicants.
- Establish quarterly meetings with host community college leadership team to enhance guided pathways to CWU.
- Establish guided pathways for Highline, Edmunds, Pierce
- Increase response time for University Center, Online, and Ellensburg transfer student inquiries.
- Launch Transfer Center

Strategy 3:
- Identify initial list of majors that Deans identify are optimal for current capacity, cost and market.
- Increase understanding of top programs.
- Conduct department specific communication plans.

Strategy 4:
- Increase outreach to prospective students and applicants.
- Increase presence at co-located community colleges
- Develop articulations with host campus for each major offered at co-located University Center.
- Enhance all transfer recruitment collateral to include University Center and Online students.
- Launch a new CWU Transfer student search piece that allows for customized content based on student type and desired campus location.
- Improve the student search experience for transfer students seeking a University Centers/Online degree.

Strategy 5:
- Enhance Financial Aid communication campaigns.
- Evaluate financial aid packaging process. Make enhancements to support a positive student experience.
- Implement text messaging system for new students regarding FAFSA requirements
- Establish competitive service response times for conducting transfer evaluations for applicants.

8 Outcomes	9 Outcomes	3 Outcomes	10 Outcomes	7 Outcomes
Start & End Measures Responsibility	Start & End Measures Responsibility	Start & End Measures Responsibility	Start & End Measures Responsibility	Start & End Measures Responsibility

SEM Plan Objective #2: Increase Enrollment Diversity

Increase the enrolled percentage of traditionally under-represented student groups (TUSG) from 32.6% in Fall 2018 to 36% by 2024.

Initiatives (8)

Strategy 1: Develop a comprehensive plan to engage in outreach to communities of color, and engage enrolled TUSGs.

Strategy 2: Tailor recruitment and communication strategies to particular TUSGs. Ensure marketing materials and University websites reflect the ethnic diversity we seek. Pay attention to the needs of parents of TUSG and first generations students

Strategy 3: Identify top secondary schools with significant TUSG populations and direct recruitment resources to these areas, focusing on building strong relationships with these schools, their principals, counselors and faculty, especially any who are CWU alumni.

Strategy 4: Create a community advisory panel of TUSG educators and other community members to serve as a sounding board for CWU's recruitment and engagement strategies and to help the University identify opportunities to connect with under-represented communities in Washington.

Strategy 5: Engage faculty to recruit TUSG students to specific majors where underrepresentation is most prevalent.

Strategy 6: As opportunities to fill vacant positions arise, ensure that the recruiting staff of CWU represents the diversity of the students we seek.

Strategy 7: During first-year onboarding, identify students in need of resources and offer a network of services, e.g. appreciative advising, financial aid navigation assistance, cultural community connection.

Strategy 8: In future academic years, hire more faculty who represent the diversity we seek.

Year One Focus Actions: Projects & Activities (17)

Launch an admissions diversity recruitment advisory counsel.

Develop DEC mission, vision and values

Amplify visibility of Diversity and Equity Center across campus.

Evaluate and make updates to recruitment printed publications, admissions website, and SFS website.

Enhance website to serve Spanish speaking groups.

Enhance Yield communication plans for specific TUSGs.

Transfer symposiums

Use Recruitment CRM to identify top secondary schools.

Use Advancement database to identify alumni teachers and/or principals.

None- this is a year 2 strategy

Discover areas of underrepresentation.

Meet with University Committees

Include "bi-lingual" in qualifications for admissions counselor job descriptions.

Advertise positions in diverse areas and venues.

Explore and evaluate recruiting position descriptions

Launch early alert messaging system to notify students at-risk, directing students to appropriate resources.

Conduct analysis to identify students who would benefit from a network of services

Implement Workforce Diversity Plan

7 Outcomes	9 Outcomes	2 Outcomes	0 Outcomes	3 Outcomes	3 Outcomes	2 Outcomes	1 Outcomes
Monitoring & Final	Monitoring & Final	Monitoring & Final	Monitoring & Final	Monitoring & Final	Monitoring & Final	Monitoring & Final	Monitoring & Final
Responsibility	Responsibility	Responsibility	Responsibility	Responsibility	Responsibility	Responsibility	Responsibility

SEM Plan Objective #3: Increase Retention & Persistence

- Increase the full-time first-year retention rate from 69% in fall 2018 (2017 cohort) to 78% by fall 2025 (2024 cohort).
- Increase first year persistence of new transfer students from 81% in fall 2017 (2016 cohort) to 85% in fall 2025 (fall 2024 cohort).
- Decrease the average time-to-degree for first time full time studnets from 17.6 to 16 terms. Decrease the average time-to-degree for transfer students from 10 to 8.7 terms.

Initiatives (6)

Strategy 1:
Develop a comprehensive plan for student learning, development and success.

Strategy 2:
Strengthen policy pertaining to first year and new transfer student success and ensure that policy is followed. Identify and remove policies and practices impeding student progression.

Strategy 3:
Transfer student onboarding: build strong connections with, and networks within, the CWU community specific to transfer students.

Strategy 4:
Modernize student related workflow and processes, and remove barriers to success.

Strategy 5:
Use and enforce conditional admissions requirements, including early completion of development coursework.

Strategy 6:
Consider factors beyond academic success when improving retention, such as meeting financial need, engagement with the university experience.

Year One Focus Actions: Projects & Activities (20)

Strategy 1:
- Continued implementation of ASL Retention Plan
- Expanded Academic Success Center tutoring & instruction
- Peer Academic Success Coaching for 1st year students
- Advising enhancements identified and prioritized
- Strategy for developmental learning in college level courses.
- Launch residential life initiative
- Success metrics of Gen Ed.

Strategy 2:
- Review and propose changes to: Holds, Academic Standing, I & IS grades, etc.
- Modernizing the student experience modality for policy and procedure related to student success

Strategy 3:
- Establish Transfer Center Facility
- Hire Transfer Center Support Staff
- Develop TC Standard Operating Procedures
- Develop & Execute Transfer Center Communications Plan
- Create pathways for newly admitted students to declare major after acceptance

Strategy 4:
- Electronic student files, electronic workflow of student processes within Registrar Services
- Advising model design & implementation
- Implement text messaging system for continuing students for SFS, Registrar, Academic Success departments.

Strategy 5:
- Recommend to council to redefine this strategy.

Strategy 6:
- Increase financial literacy for continuing students.
- Enhance co-curricular involvement through increased communication and awareness.
- Increase awareness of the Diversity & Equity Center
- Increase undergradute research and creative expression activity.

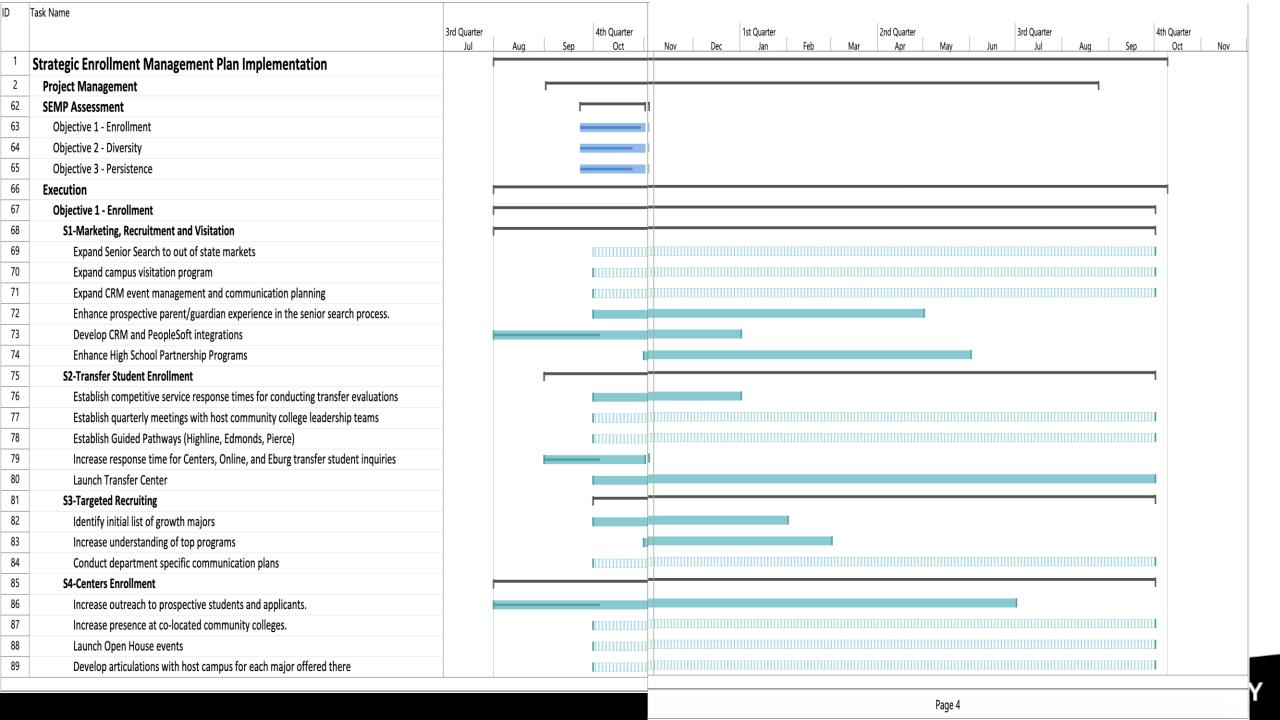| 21 Outcomes	2 Outcomes	8 Outcomes	4 Outcomes	0 Outcomes	10 Outcomes
Monitoring & Final	Monitoring & Final	Monitoring & Final	Monitoring & Final	Monitoring & Final	Monitoring & Final
Responsibility	Responsibility	Responsibility	Responsibility	Responsibility	Responsibility

C Objective:	D Initiatives	E Projects & Activities	F Measure	G Start	H checkpoint	I End	J PMO feedback	K Responsibility
• Define the result you aim to achieve- concrete attainments • In context of assessment of current/future challenges/enablers in the next 5 years. • Through the lens of Customer, Financial, Internal Process, Organizational Capabilities.	• What things will you do to reach your objective? • Can include Strategies and Tactics	• For multi-year Initiatives, include the details of projects and activities for the 1st year • Projects and Activities cascade so that employees across the organization can connect their work to how it is fulfilling the strategic objectives.	• How will you measure your progress and or completion? • Define what the measurement is that indicates the desired change has been reached. • Provide a measure for each Objective, Initiative, and Project/Activity	date or number	• PMO Useage • Utilized for reporting progress	date or number	PMO Useage	Who will be responsible?
Mission Enrollment Objective #1: Increase CWU's total undergraduate enrollment from 11589 in fall 2018 to 14205 in fall 2025.			Increase total undergraduate enrollment	11589		14205		
	#1 – Develop CWU's next generation marketing, recruitment, and campus visitation plans that expand our first-year student market share into new geographical areas while maintaining current market share. Use pre-college programs (e.g. Running Start, Game On!) as recruiting pipelines	Expand Senior Search to out of state markets	Increase ACT/SAT by 25,000.	0		25000		VPEM
		Expand campus visitation program to increase alignment with application generation.	Conduct 100 admissions presentations in conjunction with campus tours.	0		100		VPEM
		Expand CRM event management and communication planning to include pre-admissions programs.	10 GameOn! events managed through Admissions CRM.	0		10		VPEM
		Enhance prospective parent/guardian experience in the senior search process.	Build "Prospective Parent" website, inquiry form, and communication plan.	10/1/19		5/1/20		VPEM
		Develop CRM and PeopleSoft integrations to increase yield through improved communications and "nudges" for common enrollment barriers of admitted students.	Integration of FAFSA data, housing data (deposit status), transcript checklists, and enrollment status.	8/1/19		1/1/20		VP Operations
			Update Slate and PeopleSoft to Integrate after the admissions decision is made.	8/1/19		1/1/20		VP Operations
		Enhance High School Partnership Programs (Running Start & College in the High School Action)	Engage faculty teaching HSP courses in the recruitment efforts	11/1/19		6/1/20		AP - EL/O
			Social Marketing	11/1/19		6/1/20		AP - EL/O
	#2 – Develop a specific, transfer student enrollment approach. For transfer students bound for the Ellensburg campus, create a seamless transfer transition experience. For transfers headed to a Center or the Sammamish sites, partner with community colleges and corporations to create programming that meets the unique needs of place-bound students.	Establish competitive service response times for conducting transfer evaluations for applicants.	Develop a service level goal and create metrics for monitoring.	10/1/19		1/1/20		AP - U & FA
			Transfer evaluation response time	X days		X days	define response time once the above measure is completed	AP - U & FA
		Establish quarterly meetings with host community college leadership team to enhance guided pathways to CWU:	Each co-located University Center and Admissions Representative to meet quarterly.	0 (# of co-located centers)		# of quarterly meetings		AP - EL/O VPEM
		Establish guided pathways for • Highline, Edmunds, Pierce	# of Pathways	1/0/00		1/0/00		AP EL/O Registrar

Not intended for reading...

ID	Task Name	3rd Quarter			4th Quarter				1st Quarter			2nd Quarter			3rd Quarter			4th Quarter	
		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
1	**Strategic Enrollment Management Plan Implementation**																	
2	**Project Management**																	
62	**SEMP Assessment**																	
63	Objective 1 - Enrollment																	
64	Objective 2 - Diversity																	
65	Objective 3 - Persistence																	
66	**Execution**																	
67	**Objective 1 - Enrollment**																	
68	**S1-Marketing, Recruitment and Visitation**																	
69	Expand Senior Search to out of state markets																	
70	Expand campus visitation program																	
71	Expand CRM event management and communication planning																	
72	Enhance prospective parent/guardian experience in the senior search process.																	
73	Develop CRM and PeopleSoft integrations																	
74	Enhance High School Partnership Programs																	
75	**S2-Transfer Student Enrollment**																	
76	Establish competitive service response times for conducting transfer evaluations																	
77	Establish quarterly meetings with host community college leadership teams																	
78	Establish Guided Pathways (Highline, Edmonds, Pierce)																	
79	Increase response time for Centers, Online, and Eburg transfer student inquiries																	
80	Launch Transfer Center																	
81	**S3-Targeted Recruiting**																	
82	Identify initial list of growth majors																	
83	Increase understanding of top programs																	
84	Conduct department specific communication plans																	
85	**S4-Centers Enrollment**																	
86	Increase outreach to prospective students and applicants.																	
87	Increase presence at co-located community colleges.																	
88	Launch Open House events																	
89	Develop articulations with host campus for each major offered there																	

Key Learnings:

- Develop a team of key stakeholders with decision-making authority
- Use project management principles (project manager/project coordinator staff in possible)
- Agree that the plan and process isn't perfect
- Be determined to assign a measurement to every effort.

Key Learnings:

- Use existing resources for year one action items
  - Place great ideas that aren't funded in year 2 or 3
- Meet regularly
- Don't try to accomplish the objectives in year one (remind each other this is a six-year plan)
- Include others in work groups often

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Learning Outcome

- **Gain a conceptual framework for how Slate (CRM) can be configured to support SEM goals**

"When used right, technology becomes an accelerator of momentum, not a creator of momentum." – Jim Collins

Reports and Queries

- Applicant data trend report (YOY)

- Prospect data overview

- Enrollment Funnel – First-year, transfer (main campus), transfer (centers and online)

- Name Buy Source Funnel Report (and ROI indicator)

- Prospect data – Senior search and events

- Application data by region and school.

First Source

| Total | 2021 | | | | 2020 | | | | | | | | | 2019 | | | | | | | |
	Pros...	Inqu...	Appli...	Conv...	Pros...	Inqu...	Appli...	Conv...	Admits	Enrolls	Yield...	20 C...	20 C...	Pros...	Inqu...	Appli...	Conv...	Admits	Enrolls	Yield...	19 C...	19 C...
14946					8812	960	677	70.5%	556	135	24.3%	$48.51	$243....	6134	6127	605	9.9%	494	183	37.0%	$1652...	$5464...

| Metric | 2020 | | | 2019 | | | YOY Growth | | |
	Applicants	Admits	Deposits	Applicants	Admits	Deposits	Applicants	Admits	Deposits
By Count									
Academic Major									

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Undergraduate Total

Washington State

Loading...

Metric	2021					2020					2019				
	Inq	Apps	Acc	Deps	Active Deps	Inq	Apps	Acc	Deps	Active Deps	Inq	Apps	Acc	Deps	Active Deps

Washington State

| Loading... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... |

California

Loading...

Metric	2021					2020					2019				
	Inq	Apps	Acc	Deps	Active Deps	Inq	Apps	Acc	Deps	Active Deps	Inq	Apps	Acc	Deps	Active Deps

California

| Loading... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... | ... |

Other U.S.

Loading...

Metric	2021					2020					2019				
	Inq	Apps	Acc	Deps	Active Deps	Inq	Apps	Acc	Deps	Active Deps	Inq	Apps	Acc	Deps	Active Deps

Other U.S.

	2021				
Metric	Inq	Apps	Acc	Deps	Active Deps
Washington State / Active County					
WA-01 Gre...	446	6	3	1	1
King	275	5	3	1	1
Kitsap	5				
Kittitas					
Pierce					
Snoho...	166	1			
WA-02 Sou...	306	9	5		
WA-03 Gre...	301	1			
WA-04 Gre...	400	13	8	1	1
WA-05 Gre...	310	6	4		
WA-06 Belli...	108	4	2		
Total	1871	39	22	2	2

Key Learnings:

- Slate implementation takes time
- Consider Crawl, Walk, Run model
- Frontline user acceptance is essential
- Consider third-party partnerships for training and development
- Be open to other solutions

Q and A and Follow-up

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Please complete the session evaluation using the AACRAO mobile app.