

 **LEADING STRATEGIES**

# Top Down or Bottom Up: Consider a Dual-Level Approach to Enrollment Managements

*By Jason Trainer*

Increasing institutional dependency on tuition revenue paired with rising political pressures toward student success outcomes has many institutions turning to enrollment management (EM) to improve their institution's enrollment outcomes. EM is a comprehensive and inclusive process focused on achieving the optimum recruitment, retention, and graduation institutional outcomes. The academic community remains at the epicenter of this EM process. Chief enrollment officers failing to create an institutional partnership with the academic community will unlikely attain desired enrollment outcomes.

This study seeks to assist institutions by assessing how a "shared sense of responsibility" for enrollment outcomes is developed through the eyes of both chief enrollment officers (CEnO) and key academic partners (KAP). Once high-performing institutions are identified, the researcher interviewed 20 participants from twelve institutions including twelve CEnOs and eight KAPs. This study is designed with a constructivist grounded theory approach to data collection and analysis.

The findings of this study suggest institutions that are successfully drawing the academic community into their EM process do so by engaging EM at two levels of the institution, the central and local. This dual-level approach to EM creates the optimum environment for developing a "shared sense of responsibility" for enrollment outcomes with the academic units. In order for each level to effectively work together, two institutional conditions must be established: credibility and transparency. Each condition is met by addressing three distinct elements. Although each element should be addressed, the degree of importance of each element is tied to internal and external environmental influencers.

In the United States, disinvestment in higher education coupled with public outcry for institutional accountability relative to student success has many colleges and universities turning to enrollment management to improve their enrollment outcomes (SHEEO 2014). Enrollment management is being employed to stretch beyond individual marketing strategies, recruitment and retention tactics, and organizational structure. It is aiming to achieve and maintain optimal recruitment, retention, and graduation rates with the academic community remaining at the epicenter (Dolence 1993).

An institution's chief enrollment officer (CEnO) is often charged with developing and overseeing this meaningful connection with the academic community. In order to meet this challenge, chief enrollment officers must establish a consultative relationship with the academic units (Wallace-Hulecki 2007). Those who fail to partner with the academic community will be unlikely to attain desired enrollment outcomes (Hossler and Kalsbeek 2013). This study seeks to assist institutions and chief enrollment officers by assessing how a shared sense of responsibility for enrollment outcomes is developed with the academic community.

## Literature Review

### Strategic Planning

A common outcome in enrollment management is the development of a strategic plan that identifies goals, strategies, performance indicators, and responsible individuals. This process is often referred to as *strategic enrollment planning* (SEP). It is important to note that the function of enrollment management encompasses the SEP process and that SEP is often an initial and visible step taken by institutions seeking to influence enrollment outcomes. The SEP process is a complex, organized effort to connect institutional mission with academic, enrollment, student affairs, research, facilities, fiscal, technology, and fundraising plans (Hundrieser 2012). Although the SEP process is unique to each individual institution, several consistent themes are identified in the enrollment planning literature. These include: senior administrative support, broad committee formation, data-informed

processes, established goals, targeted strategies, devoted institutional resources, and aligned departmental plans.

### Organizational Structures

Organizational structures related to enrollment management are growing increasingly complex, and chief enrollment officers are finding themselves in a greater position to influence change (Penn 1999). Enrollment management structures are of four types: the enrollment management committee, the enrollment management coordinator, the enrollment management matrix, and the enrollment management division (Kemerer, Baldrige, and Green 1982; Penn 1999). Each organizational model increases the level of complexity, sophistication, and institutional investment. Regardless of the model, success often rests with the chief enrollment officer's "ability to influence, communicate, persuade, lobby, and bargain with others" (Penn 1999, 7).

No single enrollment management model works for every institution (Hossler and Bean 1990; Kalsbeek 2006; Lee 2010). Rather, enrollment management models typically evolve, becoming more sophisticated in response to need, culture, and administrative skill (DeBiaso 2012; Hossler and Bean 1990). However, enrollment management models with increased structure are more likely to force the desired institutional change or outcome (Kemerer, Baldrige, and Green 1982).

### Components and Best Practices

Enrollment management best practices comprise five essential components:

- the utilization of data to identify unique student characteristics and potential new markets;
- the strategic use of resources to create need-based financial aid programs;
- the implementation of retention programs such as early alert, orientation, and other timely professional services;
- engaging in long-term enrollment planning focused on mission, academic offerings, and enrollment projections;
- and the establishment of an organizational structure that supports coordi-

nated enrollment management efforts (Huddleston and Rumbough 1997; Keimerer, Baldrige, and Green 1982).

A common practice is to analyze and segment data typically collected in the application process, strategically identifying and targeting prospective students more efficiently (Hayes 2007). Examples of these data include GPA, standardized test scores, intended area(s) of study, location, financial need, level of interest, and/or admit status. Another common practice is to analyze data to identify and understand students' price sensitivity to tuition. This allows an institution to offer the amount of financial aid necessary to influence students' decisions to enroll (Singell 2002). Other common practices are to target increased retention and graduation rates. For example, early alert programs that provide systematic intervention have been found to improve students' progress toward degree completion (Zajacova, Lynch, and Epensshade 2005).

### **Faculty Involvement**

Enrollment management policies and procedures related to student success, program development and review, and curriculum are inherently linked to academic matters (Academic Senate for California Community Colleges 1999). Institutions that fail to engage the academic community risk isolating the enrollment management process from the innermost and essential component driving institutional mission and culture. Wallace-Huecki (2007) identifies several underlying conditions for successful participation with the academic community in the EM process:

- collaborative leadership between the chief academic officer and the chief enrollment officer;
- financial incentives linked to accountability and outcomes;
- the SEM committee comprising senior academic leadership;
- the CEnO communicates data transparently both horizontally and vertically;
- the CEnO holds a position of influence within the institution;

- communication with the faculty at large via governance bodies.

## **Purpose of the Study**

The purpose of the study was to examine how public institutions develop a shared sense of responsibility for enrollment outcomes with the academic community.

## **Research Questions**

The primary research question in this study was “what role does the academic community play in institutional enrollment efforts?” Secondary research questions were:

- How do chief enrollment officers engage the academic community to establish a “collaborative partnership” and “shared sense of responsibility” with faculty?
- How does the institution provide a unified approach toward how students move to, through, and away from the institution?

## **Methods**

This study was conducted in accordance with Charmaz's (2006) constructivist perspective of grounded theory. Grounded theory is a systematic methodology that constructs new theory through analysis of the data (Charmaz 2006). In addition, a grounded theory design uses data to systematically generate a theory “that explains, at a broad conceptual level, a process, an action, or interaction about a substantive topic” (Creswell 2012, 422). In this case, the grounded theory design examined the development of a “shared sense of responsibility” for enrollment outcomes at the institution.

## **Step One: Identification of High-Performing Institutions**

In order to determine the highest-performing enrollment management institutions, the SEM Health Assessment Survey was administered to four-year public member institutions of the National Association for College Admissions Counseling (NACAC). The SEM Health Assessment Survey was created to probe five areas: comprehensiveness of enrollment efforts, recruit-

ment, marketing, financial aid, student retention, and student services (Black 2003). Each of the instrument's 33 questions was answered using a five-point Likert scale, with five being the highest and one being the lowest. Subscale scores were calculated by averaging the responses from the Likert scale in each of the five core areas. A cumulative score was calculated by averaging the five subscale scores together.

The SEM Health Assessment Survey was e-mailed to the 385 four-year public institutions that had a permanent chief enrollment officer. The study netted a 24 percent response rate, with 91 institutions completing the electronic survey within fourteen days. The institutions were sorted from highest to lowest using the cumulative score and then were separated by the NACAC regional affiliate association. Fifteen high-performing institutions were identified for further study.

## Step Two: Institutional Interviews

Step two of the research study was to interview two participants from each identified institution—the chief enrollment officer (CEnO) and a key academic partner (KAP)—about their enrollment management success. Each interview was conducted via telephone and lasted approximately 30 minutes. All interview questions were open-ended, allowing the CEnO to identify practices, strategies, and individuals of highest importance to their success. At the end of the interview, the CEnO identified a key academic partner who had played a critical role in the institution's enrollment management success. The key academic partner (KAP) interview was important to the study because it offered an alternative viewpoint and further insight into the institution's enrollment management efforts.

Interviews were recorded, transcribed, and member checked in batches of five. The batches allowed the data to be collected and analyzed in a zigzag pattern. Transcripts underwent four rounds of coding: (1) initial codes, (2) focused codes, (3) focused codes to initial theoretical framework, and, finally, (4) theoretical codes. The joint data collection and analysis helped the study to evolve, and interview questions were adjusted to probe the emerging theoretical constructs (see Appendix).

## Findings

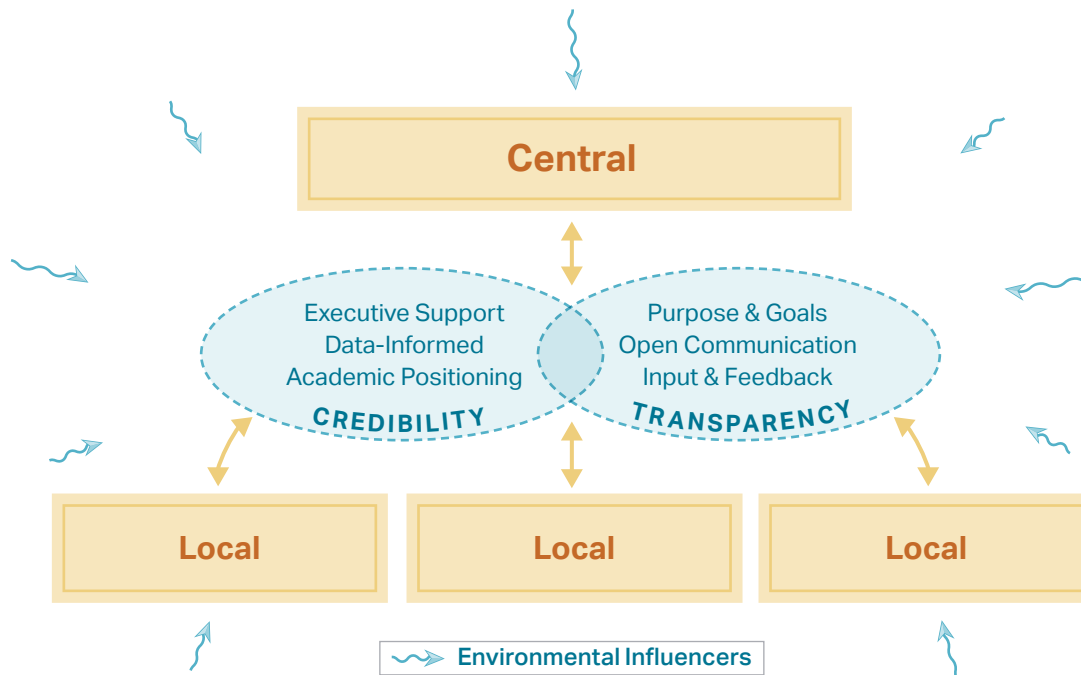
### *Emergent Theoretical Constructs*

As data were collected and analyzed, four theoretical constructs emerged. The core phenomenon and construct emerging from those institutions successfully developing “a shared sense of responsibility” for enrollment outcomes was “engaging EM at two levels of the institution.” This dual-level approach to enrollment management engaged the academic community at the institution's central and local levels. The researcher identified the dual-level construct as the core phenomenon in the initial theoretical framework. As this construct moved to the center, existing themes of data were viewed through the lens of the central construct. The result of two rounds of data collection and ongoing data analysis was a refined framework that identified three additional theoretical constructs: credibility, transparency, and environmental influencers.

Central and local levels are the “dual levels” of EM. The constructs or conditions of credibility and transparency ensure collaboration between the two levels of enrollment management. The condition of credibility is achieved through three elements: executive supported, data informed, and academically positioned. The condition of transparency is also achieved through three elements: defining purposes and goals, maintaining open communication, and providing adequate opportunities for input and feedback. Last, external and internal influencers are components of the construct of environmental influencers.

### *Dual-Level Enrollment Management Model*

Institutions and CEnOs that are able to successfully develop a shared sense of responsibility for enrollment outcomes with the academic community do so by engaging enrollment management (EM) at two levels. This dual-level approach to EM draws individual attention to both the central and local levels of the institution. In order for the central and local levels to properly inform and influence each other, the conditions of credibility and transparency must be established. Each of these two conditions comprises three elements (defined further



**FIGURE 1** ► Dual-Level Enrollment Management Model

below). In addition, internal and external environmental influencers impact priorities at each level of the institution, as do the individual elements impacting the conditions of credibility and transparency. The dual-level enrollment management model identifies institutional levels, necessary conditions, and environmental influencers (see Figure 1).

### ***Establishing Central-Level EM***

Establishing enrollment management (EM) at the central level focuses on the creation of broad institutional initiatives. These initiatives are often aligned with institutional strategic plans and typically address areas of sought improvement, such as enrollment, retention, diversity, and overall academic quality across the institution.

The advantage of establishing central-level EM is the ability to approach institutional initiatives as a single entity; a challenge, however, is garnering meaningful involvement of the academic community. Faculty participation at the central level should include committees, shared governance, and other methods for faculty

to provide feedback and input regarding institutional priorities. Faculty who develop a deeper understanding of enrollment management at one level are likely to serve as stronger partners and collaborators at the other level.

### ***Establishing Local-Level EM***

Establishing enrollment management (EM) at the local level transitions initiatives into the academic units that together make up the institution as a whole. Academic units include colleges, departments, and academic programs. Local-level EM focuses on the same initiatives as those at the central level: enrollment, retention, diversity, and academic quality. The advantage of establishing local-level EM is the increased ability to garner stronger understanding, involvement, and commitment by the academic community. Local-level EM is advantageous because activities derive from the passions and expertise of the faculty; a major challenge is the complexity and timeliness of orchestrating multiple priorities and initiatives across various academic units within the institution.

## *Interaction Between the Dual Levels of EM*

In order for the central and local levels to successfully inform and influence each other, conditions of credibility and transparency should be established. Each condition is comprised of three elements; the degree of importance of each element is tied to internal and external environmental influencers. Credibility is earned by rooting enrollment management efforts, ensuring they are supported by the executive team, data informed, and academically positioned within the institution. The latter is established through organizational structure, academic relationships, and credentials.

Transparency focuses on creating an environment where enrollment management is clearly visible and understood throughout the organization. Transparency is achieved by implementing an enrollment management process that defines purpose and goals, maintains open communication, and provides adequate opportunities for input and feedback.

## *Accounting for Environmental Influencers*

It is important to identify the environmental influencers impacting both the central and local levels and to account for them within the enrollment management process. Environmental influencers may be internal or external and affect central and local levels as well as credibility and transparency. For an institution to develop an effective enrollment management process, it must account for the unique blend of influencers exerting pressure on it.

For example, the central level may be subject to external pressure from state entities to increase enrollment or as a result of decreasing financial support. At the same time, local levels of the institution might be subject to external pressure from accrediting bodies to be more selective or to improve student outcomes. Accounting for these unique pressures fosters collaboration across the institution as it strives to attain desired enrollment outcomes. In addition, accounting for internal influencers helps determine the importance of each element comprising credibility and transparency. For example, if the institution has a culture characterized by faculty mistrust of administration, then strategies

targeting the elements of transparency will be of utmost importance to the enrollment management process.

## *Making Decisions*

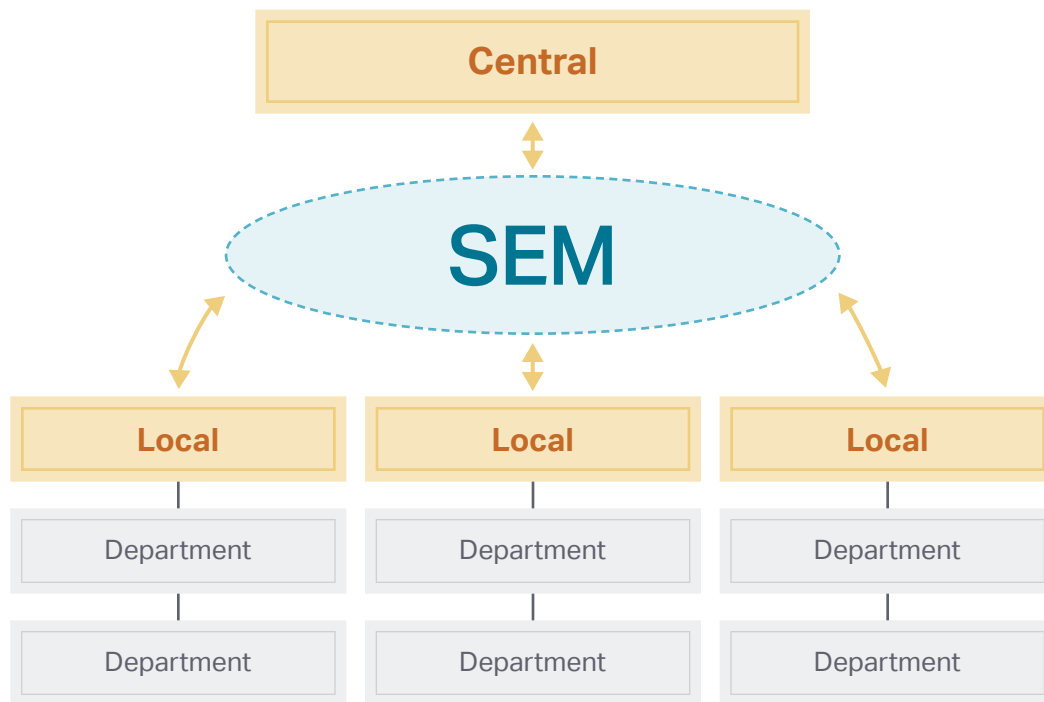
The dual-level enrollment management model can be used to review and direct institutional enrollment management efforts. For example, the model could be used to conduct an audit of past and/or present enrollment management efforts or to influence the EM process created by the strategic enrollment management (SEM) committee.

## *Conducting an EM Audit*

The dual-level enrollment management model is ideal for auditing an institution's past and current EM efforts. The model is especially useful for institutions struggling to develop a shared sense of responsibility with the academic community for enrollment outcomes. The model helps the institution identify areas for further improvement by facilitating auditing of the enrollment management process. The model provides a means by which institutions can examine their past actions and/or current enrollment management processes. The conclusions of an EM audit can be used in the SEP process, which is a visible and essential component of EM.

■ **Auditing the Dual Levels.** When conducting an EM audit using the dual-level model, questions should probe both levels of the institution. For example, is the institution taking into account both the central and local levels? Are the institution's enrollment management efforts pushed strictly downward from the central level? What are the enrollment management initiatives that can be identified at both levels of the institution? Do the two levels successfully inform and influence each other? Describe faculty participation and buy-in at each level of the institution.

When conducting this enrollment management audit, it is also important to recognize that conditions, credibility, and transparency are in no particular priority order. The audit is not intended to identify a proper sequence; rather, it should highlight areas that need to be addressed. In addition, the degree of importance of each of the elements is determined by accurately identifying key environ-



**FIGURE 2** ► Dual-Level Approach to SEM Committee

mental influencers. If an institution has an internal culture in which faculty members do not participate in enrollment management activities, then it may be difficult to get buy-in (at least initially). In such a case, the elements of executive support, clear purpose and goals, and open communication are critical to developing a culture that supports faculty acceptance of and participation in enrollment management.

- **Auditing Credibility.** When reviewing the condition of credibility, the institution should evaluate the areas of executive support, data-informed decisions, and academic positioning. For example, do the president and senior-level administration serve as champions for enrollment management? Is every aspect of the enrollment management process informed by data? How is enrollment management positioned in relation to academics at the institution? Does the EM division link directly to the institution's president or provost? Does the chief enrollment officer have a terminal degree or strong ties to the faculty?

- **Auditing Transparency.** When reviewing the condition of transparency, be sure to evaluate purpose and goals, open communication, and opportunities for input and feedback. For example, do the institution's enrollment management efforts clearly define purposes and goals? How are these purposes and goals being communicated openly and consistently across the institution? Are there adequate opportunities for the academic community to provide input and feedback regarding EM processes and initiatives?

### *Influencing the Strategic Enrollment Management (SEM) Committee*

The dual-level enrollment management model is also ideal for influencing the institution's strategic enrollment management (SEM) committee. The dual-level model can be used to create and guide the EM process (see Figure 2), which is often overseen by a SEM committee. The committee selection process should ensure participation by key areas, thereby encouraging alignment and integration of central- and local-level goals

and initiatives. The model can also be used to guide specific enrollment management processes. For example, task groups can be created at each EM level with recommendations brought back to the SEM committee for prioritization, selection, and oversight. (See below for additional examples of the dual-level EM model being used to influence the SEM process at both the central and local levels of the institution.)

■ **Institutional/Central Level.** SEM at the institutional or central level focuses on broad institutional initiatives, such as data mining and market analysis. This information will likely lead to the formation of task groups charged with researching, developing, and presenting recommendations to the SEM committee. Institutional SEM task groups may focus on scholarships, marketing and communication plans, academic advising, transfer friendliness, or early alert, among others.

■ **College/Local Level.** SEM at the college or local level will focus on auditing, prioritizing, and recommending action items within each college. A team will be created to assist colleges and departments in auditing as well as in developing recommendations regarding their students' progress. Collaboration at the departmental level will result in the articulation of goals and strategies and the dedication of resources to the program's recruitment and retention ideas. The results of departmental audits will be collected for the dean to review and prioritize. Initiatives selected by the deans move "upward" for consideration by the SEM committee.

### *The SEM Committee Dual-Level Process*

- Select broad SEM committee membership.
- Develop institutional EM activities—*e.g.*, data mining and market analysis.
  - ★ Form task groups based on findings.
  - ★ Develop and propose recommendations to the SEM committee.
- Develop college/departmental audit activities.
  - ★ Design audit worksheets for distribution.
  - ★ Create an EM audit team to assist colleges and departments.

- ★ Identify college priorities and push recommendations to the SEM committee.
- Select SEM priorities from institutional and college-level recommendations.
  - ★ Establish performance and outcome goals.
  - ★ Develop strategies to meet established goals.
  - ★ Implement developed strategies for follow-up, measurements, and adjustment.

## Recommendations

### *Make EM Both Central and Local*

The primary finding of this study relates to the importance and value of engaging the academic community at both the central and local levels of the institution. This dual-level approach to EM creates an optimal environment for achieving a shared sense of responsibility with the academic units for enrollment outcomes. Special attention and considerations at both levels should exist within EM efforts. Each level adds a distinct value and should inform and influence the overarching strategic direction of the institution's EM process. For example, the central level focuses on broad institutional initiatives such as data mining and market analysis while the local level focuses on college or departmental initiatives such as identifying recruitment and retention priorities. (Environmental influencers that may impact each level differently are discussed below.)

A top-down approach to EM risks isolating the process from the academic units. In addition, a strictly downward approach discourages a shared sense of responsibility for enrollment outcomes across the institution.

### *Recognize Environmental Influencers*

Environmental influencers should be considered when developing and implementing EM initiatives. Environmental influencers provide internal and external pressure at the central and local levels. By accounting for various environmental influencers, the institution's EM efforts will be better positioned to achieve desired outcomes.

Consider, for example, an institution facing external pressure at the central level to increase enrollment in

order to establish financial stability. At the same time, an academic department at the local level may be experiencing external pressure from accrediting agencies to tighten admissions criteria in order to increase student success outcomes. This same institution may also be characterized by an internal culture of mistrust between administration and faculty. All of these influencers should be taken into account in order to develop the institution's ideal enrollment management process.

### ***Establish Credibility with the Academic Community***

It is important to establish a sense of credibility regarding enrollment management with the academic community. Credibility is established by being executive supported, data informed, and academically positioned. The institution can academically position the EM process through organizational structure or via CEnO relationships and credentials.

Credibility is all about positioning the EM process as an institutional priority. Executive support should include EM champions as well as adequate financial resources. (In fact, it is recommended that financial resources be connected to enrollment initiatives and desired outcomes.) The use of data throughout the EM process also adds credibility and is key when developing support among the academic community. Last, the EM process needs to be positioned to collaborate effectively with the academic units. Organizational structure is a common approach, where the EM function is positioned directly “under” the president or provost. The EM process can also be positioned academically by having a chief enrollment officer (CEnO) who either has strong faculty relationships or has earned advanced academic credentials. (A CEnO who served previously as a faculty member or who has completed a doctoral degree is more likely to be supported by faculty members.)

### ***Facilitate Collaboration Through EM Transparency***

Transparency is vital for successful collaboration with the academic community. Faculty members want to easily understand and have a voice in the institution's

enrollment management efforts. A transparent enrollment management process clearly identifies purpose and goals, maintains open communication, and provides adequate opportunities for input and feedback. Transparency also encourages the free flow of information between central and local levels.

Everyone at the institution should understand what is driving the enrollment management process. For example, the reasons the institution wants to increase its retention and graduation rates should be clear. All aspects of the EM process need to be communicated at every stage and level of the institution: Be sure to create opportunities for faculty to provide input and feedback; such opportunities may include open forums, participation on institutional committees, and/or presentations to faculty governing bodies. By engaging directly with governing bodies—for example, through shared governance—enrollment outcomes are reinforced as an institutional priority and shared responsibility of the academic community.

## **Conclusion**

In summary, institutions that are successfully involving the academic community in their enrollment management efforts do so by engaging EM at two levels: the central and the local. This dual-level approach to EM creates the optimum environment for developing a shared sense of responsibility with the academic units for enrollment outcomes. In order for each level to work with the other effectively, two institutional conditions must be established: credibility and transparency. Credibility is typically gained as a result of executive support, data-informed decisions, and academic positioning. Transparency is satisfied by having a clear purpose and goals, open communication, and opportunities for input and feedback. While each element should be addressed, the degree of importance of each is likely to be determined by internal and external environmental influencers.

The dual-level enrollment management model is an effective means by which to audit and review institutions' current EM efforts. By identifying areas for further development and improvement, the model is especially useful for institutions struggling to develop a shared

sense of responsibility for enrollment outcomes with the academic community. The findings of the current research inform the following four recommendations:

- Purposefully engage both central and local levels.
- Take into account environmental influencers.
- Establish credibility with the academic community.
- Develop transparency with the academic community.

The assumptions and limitations of the study were affirmed. The dual-level enrollment management model is supported by the literature with an interpreted contradiction regarding the role of local-level EM within SEP. Opportunities for further research are numerous and include the following: studying EM at private and two-year institutions; exploring EM conditions, credibility, and transparency; using the dual-level EM model to audit institutions; examining SEP in relation to the dual-level EM model; and further investigating the impact of local-level EM on faculty perceptions.

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## Appendix

### *Initial Interview Questions*

- Describe why enrollment management was implemented at your institution.
  - ★ What were the goals or reasons for EM implementation?
  - ★ Where does EM report in the organizational structure?
- Has implementation of enrollment management been a collaborative process? If so, who have been key partners in your institution's success?
  - ★ Describe the involvement of academic affairs in the EM process.
  - ★ Describe any steps or actions you or your department have taken to encourage collaboration throughout the EM process.
- What have been the greatest successes of enrollment management at your institution?
- What have been the greatest challenges or criticisms of enrollment management at your institution?

### *Revised Interview Questions*

- Describe the function of enrollment management at your institution.
  - ★ What does enrollment management look like at the institutional level?
  - ★ What does enrollment management look like at the divisional or departmental level?
  - ★ Could you provide examples of enrollment management activities at each level?
- How would you describe the transparency of enrollment management at your institution?
  - ★ To what extent were input and feedback collected in your enrollment management process?
- How would you describe the credibility of enrollment management at your institution?

## About the Authors



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