CASES FROM THE FIELD

Creating a Strategic Enrollment Plan from the Ground Up

By Chuck Knepfle

Writing a strategic enrollment plan can be overwhelming, but a good plan is essential to any higher education institution. Involving the right people on campus and ensuring that the plan is developed on the basis of facts and relevant data are critical. Once the goals of the plan are determined, building a model for testing various enrollment scenarios can be especially helpful as long as the underlying assumptions about projected enrollment trends, expenditures, and revenues are accurate.

When negotiating with the provost about accepting the position of associate vice president for enrollment management, I asked what he wanted me to accomplish in my first year on the job. Without hesitation, he told me that he wanted me to write the institution's first undergraduate strategic enrollment plan. Our institution had experienced significant enrollment growth over the prior decade, but it was unplanned and unscripted. Future growth, if that were the agreed-upon goal, would require that resources be allocated appropriately. And if growth were not a goal in the strategic plan, we should not proceed. Most important, we needed to ensure that the undergraduate student experience, a hallmark of the campus and among our alumni, should not be jeopardized. Ten months later, the plan was complete, and many of its recommendations had already been implemented.

Some colleges can grow and develop their enrollment mix organically. Most, however, net better results by planning growth around enrollment goals. Strategic enrollment planning not only sets enrollment goals but helps identify trade-offs that may need to be made to attain them; a well-written plan can provide a glimpse of what an institution will look like in three, five, or ten years.

Bontrager and Green (2014) call strategic enrollment planning "among the most critical planning tasks for most institutions" (533) and note that the skill set for writing an effective plan includes a knowledge base of mission, vision, market position, opportunities, and challenges beyond that of many university leaders. I strive to position myself as an effective manager and encourage any enrollment leader to strive to be one as well.

Required Representation

A successful strategic enrollment plan requires buy-in from those charged with its implementation. The enrollment manager needs to determine which people are

needed at the table in order for the right questions to be asked, for the right decisions to be made, and, most important, for administrative approval when a final product is presented. A smaller committee (fewer than ten people) is ideal for a working group, unless the group is so small that its members do not possess either the collective expertise to answer the questions that arise as the plan develops or the relationships across campus to promote buy-in once the plan is finalized. In such cases, your and others' work could be for naught. It can be difficult to reach consensus and even to schedule regular meetings with larger groups.

As important as group size and representation are the personalities, backgrounds, and working styles of the individuals chosen to serve on the committee; these will have a greater impact on the plan's success than will the number of members or the offices they represent. Unless an enrollment manager is brand new to a campus, it is likely that she will already know with which colleagues it is easiest to work. Coworkers who stubbornly resist change and refuse to compromise are not ideal partners in the enrollment planning process. It is also important to identify staff who will support the enrollment planning process outside of meetings. Planning of this magnitude relies on the collective efforts of the team and will not succeed if the enrollment manager does the majority of the work. All team members will need to accept the group's shared goals and resist the urge to veer off on tangents or discussions that are not directly relevant to the project.

In an effort to keep the group at my institution small but effective, I started with the organizational chart and identified an individual under each vice president who I knew to be cooperative and hard working. In some instances, I was able to assign two functions to one person. For example, the president's chief of staff was serving as the interim chief diversity officer and thus was able to represent both areas in meetings and deliberations. Given my own background in financial aid, I was able to represent that office's concerns, which "saved" another position on the committee. Faculty representation was the exception to my rule of keeping the group small. I was not comfortable having only one person represent the needs of the entire faculty, so I asked both the dean of the School of Engineering and the chair of the history department to participate. Given the institution's long history of excellence in the sciences, it was important for engineering to have a prominent role. I also knew that funding and supporting the institution's general education efforts was a particularly sensitive issue on campus, so I chose a chair who could effectively represent those concerns. The task force included the following nine people plus a Ph.D. student from the higher education leadership program:

- Associate vice president for enrollment management
- Chief of staff, president's office/interim chief diversity officer
- Director of undergraduate admissions
- University budget director
- Professor and chair, Department of History and Geography
- Dean, College of Engineering, Computing and Applied Science
- Academic market strategist, university communications
- Senior associate vice president, student affairs
- Associate provost/institutional effectiveness
- Ph.D. student, Educational Leadership, College of Education (resource member)

Given its responsibility for student retention, it would have been advisable to include a representative from undergraduate studies. And although we treated retention and graduation rates as fixed in the modeling, had we instead looked upon them as variables, we could have tested various changes in those rates and had more enrollment scenarios with which to work. Two other areas to consider are honors and athletics. Our chief of staff was able to effectively represent athletics, and the director of undergraduate admissions represented honors' enrollments and goals. One last idea is to have other people attend one or two meetings as advisors regarding specific topics. We utilized this approach to hear from the local town's city planner. The town-gown relationship is important to our institution, and the town's

input was critical. That said, there was no need to for it to have representation at every meeting or to provide it with undue influence over the plan's development.

Determine Your Institution's Enrollment Goal

Different higher education institutions have different enrollment goals. Some, like my institution, want to manage their overall enrollment and fine-tune some specific goals—for example, diversity, honors students, or national rankings. Others focus all efforts on net tuition revenue. Hillman (2012) defines net tuition revenue as "the gross tuition revenue less tuition discounts excluding tuition waivers. Under this definition, net tuition revenue is the final amount of funds brought into institutional budgets from student tuition payments" (271). An institution may seek to slow growth or even decrease its enrollment permanently. Enrollment management in its purest form is the management of tradeoffs; an enrollment plan should effectively balance those tradeoffs to attain the optimal enrollment mix for the institution. For example, increasing out-of-state enrollment might be advantageous to a public school's net tuition revenue, but a negative reaction by the school's alumni, board of trustees, and state legislators may override concerns about revenue. Another tradeoff might occur for schools located in small cities. While a school might benefit from overall enrollment growth, degradation of the school's relationship with the city and its citizens might cause more problems than enrollment growth solves.

It is also imperative to establish a timeline for completion of the enrollment plan. My institution established a ten-month timeline for completion; other institutions may adopt a shorter or longer schedule.

Decide What Data Are Needed

The size and characteristics of an institution's ideal enrollment or optimistic enrollment targets must be based on analysis of accurate trend data. It is important to know the starting point before establishing goals. The task force at my institution focused on data in two areas: enrollment trends and competitor/peer data.

Enrollment Trends

Before deciding exactly what the enrollment should be, it was important to understand the history that informed the institution's current size. A chart of fall enrollment by year provided summary information about annual enrollment trends (Table 1). In the case of my institution, we observed that its ten-year enrollment growth was 33 percent for undergraduates, 50 percent for graduate students, and 39 percent overall.

TABLE 1 ➤ Fall Enrollments (Headcount) by Year

Year	Enrollment		Total
	Undergraduate	Graduate	
2006	14,172	3,137	17,309
2007	14,270	3,315	17,585
2008	14,713	3,604	18,317
2009	15,536	3,675	19,211
2010	15,549	3,994	19,543
2011	15,836	4,078	19,914
2012	16,562	4,206	20,768
2013	16,931	4,372	21,303
2014	17,260	4,597	21,857
2015	18,016	4,682	22,698
2016	18,599	4,762	23,361
2017	19,402	4,985	24,387

Another important set of data was demand, as measured by numbers of admission applications and admit rate. (The market is also a critical consideration; for more information, see below.) Increasing application numbers and decreasing admit rates are both indicators of strong demand; visualizing the data helped the task force understand that the market appeared able to support an increase in first-year student enrollment (Table 2, on page 8). Volkwein and Sweitzer (2006) document a link between selectivity indexes such as acceptance rate and overall academic reputation scores in the *U.S. News & World Report* survey results, which was also an important consideration for my institution's team.

TABLE 2 ➤ Number of Freshman Admission Applications and Admit Rate

Year	Applications	Accepted	Enrolled	Admit Rate (%)
2006	12,784	6,990	2,813	54.7
2007	14,254	7,154	2,765	50.2
2008	15,542	8,355	2,927	53.8
2009	16,282	10,224	3,386	62.8
2010	16,865	9,724	3,017	57.7
2011	17,016	10,215	2,935	60.0
2012	18,500	10,706	3,465	57.9
2013	18,604	10,645	3,290	57.2
2014	20,756	10,694	3,482	51.5
2015	22,396	11,483	3,448	51.3
2016	23,506	11,891	3,685	50.6
2017	26,242	12,380	3,650	47.2

TABLE 3 ➤ Number of Graduates in Fastest-Growing Programs (Majors with at Least 50 Graduates)

Program	2010–2011	2015–2016
Accounting	56	118
Agricultural Mechanization and Business	14	43
Biochemistry	17	39
Bioengineering	56	107
Biological Sciences	152	268
Computer Engineering	31	50
Computer Science	55	121
Economics	73	120
Electrical Engineering	51	97
English	42	92
Environmental and Natural Resources	21	32
Environmental Engineering	0	34
Industrial Engineering	54	128
Materials Science and Engineering	0	56
Packaging Science	34	56
Psychology	148	231
Wildlife and Fisheries Biology	19	38

Once the task force confirmed the institution's overall capacity to grow, the next step was to evaluate student demand for various majors. Because we were evaluating the capacity for degrees earned and not initial enrollment into majors, the task force worked with the institutional research team to identify those programs that had experienced the most growth over the previous five years. The data indicated demand and capacity for growth in many programs, including accounting, biological sciences, engineering, computer science, and psychology (*see* Table 3). This proved an opportune time to evaluate the membership of the team. Had we determined that growth might occur in colleges or programs not already represented, adding a professor or dean might have proven beneficial.

After analyzing current programs' popularity, evaluate those majors needed by businesses in your institution's state or region as well as those projecting high starting salaries and job placement rates. Our task force did not review such data, but subsequent to issuing our report, the institutional research team and the CFO's office partnered with an external firm to consider those factors.

A final data point that might be beneficial to review is the number of high school graduates from the institution's primary feeder state(s). Specifically, ask questions about the school's market share and what part of the market is converting to applicants and enrollees. Even with adequate capacity and historical evidence of demand by current and prior students, if the size of the student population from traditional feeder areas is decreasing, the student base your institution may be counting on in fact may not exist. For example, Table 4 (on page 9) presents the number of high school graduates in the state of Georgia from 2011 until 2032. Because the raw numbers are not critical data for this question, a pictorial representation quickly and clearly displays the trend line and can facilitate decision making.

Competitor/Peer Data

One characteristic of almost every successful enrollment manager is a firm understanding of the competition. Most enrollment managers can quickly name the schools with which their institutions cross applications, admits, and enrollees. Not only does this knowledge give enrollment managers insight into the competition's efforts to negate effects on its own enrollment, but it can also provide insight into future trends. My institution is no different. Paying attention to what geographic peers are doing is important for our messaging and marketing efforts; we also monitor the initiatives of schools across the country whose relative place in various college rankings directly affects our institution's placement on them. For these data, I sought the overall undergraduate enrollments at all of the "top public colleges and universities." (The task force and others have found it helpful to know our institution's relative place on the list.) The majority of our peer and aspirational institutions are in the southeast.

With the aforementioned data, along with information about the academic merit of the freshman class (as measured by standardized test scores, high school GPAs, and class ranks), international student enrollment data, transfer applications, and in-state/out-of-state comparisons to other public universities in the state, the task force was ready to begin modeling specific enrollment decisions.

TABLE 4 ➤ Projected Number of High School Graduates from the State of Georgia

School Year	High School Graduates
2011–12	98,481
2012–13	99,939
2013–14	102,511
2014–15	103,393
2015–16	104,126
2016–17	103,912
2017–18	106,728
2018–19	108,051
2019–20	106,367
2020–21	104,714
2021–22	105,313
2022–23	106,005
2023–24	109,349
2024–25	111,911
2025–26	109,613
2026–27	105,484
2027–28	99,637
2028–29	98,386
2029–30	96,920
2030–31	95,876
2031–32	97,478

Source: WICHE 2016.

Enrollment Modeling

The science of modeling enrollment over time can be as simple or as complex as one chooses. Armed with an Excel spreadsheet, projections of fall enrollments, retention rates, and four- and six-year graduation rates, it is possible to compute rough enrollment estimates for any freshman and transfer class. However, as with any modeling exercise, the more data that inform the model, the more accurate the model is likely to be. I decided that my institution's enrollment model would be as complex as feasible. I did not believe it was possible to accurately predict overall enrollment in ten years, but I did want to be able to tell stakeholders that we had accounted for all of the details they had asked about when the task force had presented the enrollment model to the campus community. For example, although we could have used a single average faculty salary to project faculty expenses, we instead used a weighted average by college in an effort to capture varying salary requirements by academic field.

An enrollment model cannot be all things to all stakeholders, so it is important to decide what the model will and will not be. Be sure to decide which data will be modeled and which will be considered constant. We modeled freshman and transfer overall class size, freshman in- and out-of-state mix, number of international students, number of new students (freshman and transfer) who would begin in the spring semester, and net revenues. We opted to not include average test scores, retention rates, or diversity targets. Not including those

TABLE 5 ➤ Fall 2016 Undergraduate Enrollment at *U.S. News & World Report's* Top Public Colleges and Universities

University	Undergraduate Enrollment
College of William and Mary	6,276
Georgia Institute of Technology	15,489
University of Virginia	16,331
University of North Carolina, Chapel Hill	18,523
University of Pittsburgh	18,547
Clemson University	18,599
University of California, Santa Barbara	21,574
University of Connecticut, Storrs	22,337
University of California, San Diego	26,590
University of California, Irvine	27,187
University of Georgia	27,951
University of California, Davis	28,384
University of Maryland, College Park	28,472
University of Michigan, Ann Arbor	28,983
University of California, Berkeley	29,310
University of Wisconsin, Madison	29,580
Purdue University	30,043
University of California, Los Angeles	30,873
University of Minnesota, Twin Cities	30,975
University of Washington, Seattle	31,418
University of Illinois, Urbana Champaign	33,368
University of Florida	34,332
University of Texas, Austin	40,168
Pennsylvania State University, University Park	41,359
Ohio State University	52,349

items did not imply that they were unimportant to the institution's overall enrollment goals (in fact, those are three of its highest priorities). Rather, we wanted to focus on the question posed at the outset of our work: what is our institution's ideal overall undergraduate enrollment? Future efforts will focus on strategies for meeting targets for selectivity, retention, and diversity. Constraints such as classroom and residence hall capacity, parking, office space, etc. also must be considered; such expenditure considerations are addressed below.

Remember that the more variables introduced into the model, the more complex the model will be. Starting small and building upon prior work may simplify planning and make it more effective.

Having decided which model inputs would be used, our focus shifted to the constants our model would consider. Because we were modeling both enrollment size and net tuition revenue, we needed to consider any variable that would have an impact on the size of the undergraduate student body as well as many financial (revenue and expenditure) factors.

Revenues

An institution may want to grow for any number of reasons, most of which relate ultimately to increasing revenue in order to implement the institution's goals and objectives. My institution had just completed a strategic plan and was interested in the funding an enrollment increase could provide. The strategic enrollment plan needed to accurately project additional revenues and expenditures associated with any enrollment increase.

I began by dividing the undergraduate class into cohorts according to the years when students enrolled. It is important to know which data will be used. Projections based on student enrollment by entry (cohort) year differ from those based on credit hours. For example, a new freshman who enrolls with 30 hours of Advanced Placement credit will be a freshman in the cohort model and a sophomore in the credit hour model. Understand the nuance of the data before deciding how to structure the enrollment model. Then, because the institution is a public university, I separated each class into in-state and out-of-state categories; this was critical for revenue projections.

From there, the projections were straightforward: retention and graduation rate percentages were applied to each cohort (*e.g.*, freshman in state, freshman out of state, sophomore in state, sophomore out of state, etc.) as each progressed to the next year (*see* Table 6, on page 11). New first-year and transfer students are placed into the model each year, and students who graduate or otherwise leave the institution are cycled through. Different first-year and transfer class sizes as well as various in-state/out-of-state mixes are then reflected in the revenue projections for each year.

TABLE 6 ➤ Enrollment Model Constants: Revenues

Description	Value (%)	Source
Freshman Second-Semester Retention	95.0	Office of Undergraduate Studies
Freshman-Sophomore Retention	93.0	Office of Undergraduate Studies
Sophomore-Junior Retention	95.3	Office of Undergraduate Studies
Junior-Senior Retention	95.3	Office of Undergraduate Studies
First- to Second-Semester Attrition	94.0	Office of Undergraduate Studies
Transfers Who Begin as Freshmen (Fall)	8.0	Office of Institutional Research
Transfers Who Begin as Sophomores (Fall)	70.0	Office of Institutional Research
Transfers Who Begin as Juniors (Fall)	19.0	Office of Institutional Research
Transfers Who Begin as Seniors (Fall)	4.0	Office of Institutional Research
Transfers Who Begin as Freshmen (Spring)	3.0	Office of Institutional Research
Transfers Who Begin as Sophomores (Spring)	59.0	Office of Institutional Research
Transfers Who Begin as Juniors (Spring)	24.0	Office of Institutional Research

Expenditures

My institution strives for the lowest possible student-to-faculty ratio. The ability of students to interact with faculty is critical for us as well as for the board of trustees. Accordingly, the first constant included in the enrollment model was an estimate of faculty cost to ensure that the number of faculty would increase in proportion to the increase in the number students. The easy calculation was how many additional faculty were needed: For example, if the preferred student to faculty ratio was 18:1, then one faculty member needed to be added for every additional eighteen students who enrolled. Determining the cost associated with each additional faculty member was more complicated. At my institution, where almost 70 percent of undergraduates major in engineering, science, and business, general education courses are less costly than courses in most majors. We determined that general education costs were $1,680 per student for bachelor of science degrees and $2,240 per student for bachelor of arts degrees. With 83 percent of undergraduates enrolled in bachelor of science degree programs, the weighted average general education cost per student was $1,775.20. The second half of this calculation was to determine the teaching costs once a student advanced to major-specific courses. On average, non–general education coursework accounted for 75 percent of all courses taken. Our calculations multiplied 75 percent by the number of faculty needed and by the weighted average (by college) of faculty salaries ($142,690) plus one teaching assistant per faculty member.

This degree of detail may not be necessary; a simple calculation of the number of faculty multiplied by the average salary and benefits for all faculty may be sufficient. My team went the extra step for most cost calculations in order to increase campus-wide buy-in. At every presentation I gave, faculty appreciated that we had allocated for the cost of a teaching assistant for each additional faculty line. And verifying that we had accounted for the higher faculty costs in the colleges of engineering and business generated nods of appreciation among deans and budget staff.

Most other cost considerations were straightforward (*see* Table 7, on page 12). For example, my institution strives to maintain a 250:1 student to freshman advisor ratio, so for every 250 new students, we added the $75,000 salary and benefit cost of an additional professional advisor. Parking Services advised that approximately 0.6 parking spaces were required for every student on campus, at a cost of $5,000 per surface-level parking spot. Admission recruitment and scholarship expenditures were also taken into consideration.

Incorporating the fixed costs of capital building projects (*e.g.*, classrooms, offices, residence halls, etc.) proved challenging. The Office of Institutional Research directed me to data on our state higher education governing board's Web site that provided costs estimates for various building projects; I was able to utilize enrollment growth in conjunction with "recommended space per student data" to approximate the cost of various building projects. The cost of each capital project was projected over a fifteen-year pay-off period, and the resultant annual cost was built into each year's expenses.

TABLE 7 ➤ Enrollment Model Constants: Expenditures

Description	Value	Source
Student to Faculty Ratio	18:1	Office of Institutional Research
General Education—B.S.	$168,000/100 Students	College of Arts, Architecture, and Humanities
General Education—B.A.	$224,000/100 Students	College of Arts, Architecture, and Humanities
Faculty—Agriculture, Forestry and Life Sciences	$155,676	Human Resources/Payroll
Faculty—Architecture, Arts and Humanities	$101,814	Human Resources/Payroll
Faculty—Behavioral, Social and Health Sciences	$130,357	Human Resources/Payroll
Faculty—Business	$183,021	Human Resources/Payroll
Faculty—Education	$128,697	Human Resources/Payroll
Faculty—Engineering, Computing and Applied Sciences	$158,840	Human Resources/Payroll
Teaching Assistant	$24,000	Human Resources/Payroll
Freshman Advisor Ratio	250:1	Dean of Undergraduate Studies
Staffing—Student Affairs	$74,505:100 Students	Division of Student Affairs
Staffing—Admissions/Recruitment	$119,400:100 Enrolled Freshmen	Office of Undergraduate Admissions
Staffing—Student Services	$218,750:250 Students	Human Resources
Staffing—Departmental Administrators	15:1 Faculty Member Hired	Human Resources
Parking Spaces per Student	0.6	Parking Services
Parking Cost: Ground Space	$5,000	Parking Services
Parking Cost: Garage Space	$18,000	Parking Services
Classroom Space (Square Feet per Student)	1.22	State Governing Board
Cost per Square Foot—Classroom	$970	State Governing Board
Lab Space—(Square Feet per Student)	7.20	State Governing Board
Cost per Square Foot—Lab	$2,000	State Governing Board
Study Space—(Square Feet per Student)	25	State Governing Board
Cost per Square Foot—Study Space	$970	State Governing Board
Faculty Office Size—(Square Feet)	190	State Governing Board
Cost per Square Foot—Faculty Office	$970	State Governing Board
Staff Office Size—(Square Feet)	208	State Governing Board
Cost per Square Foot—Staff Office	$970	State Governing Board

Present Various Scenarios to Management

Armed with a model that could project the revenues and expenditures for any scenario, it was time for the task force to make recommendations to upper management. It was also at this point that the task force could introduce variability into factors initially considered fixed. For example, the model assumed a 93 percent freshman-to-sophomore retention figure, but 95 percent (our aspirational target) could be assumed to evaluate its effect on enrollments and tuition revenue. If your institution monitors financial aid and discount rates closely, your model would ideally include an option for various discount rates or total financial aid budget.

Given my institution's location in a small town that had not readily adapted to a 30 percent enrollment increase over the prior decade, we set a 30 percent enrollment increase over ten years as a cap and only considered sharing plans with upper management that equaled or were less than that increase. We looked at the revenue differences generated by various in-state/out-of-state mixes and evaluated what the institution's academic profile might look like if growth were focused on transfer students versus traditional first-time freshmen. The task

force presented four options to the president's executive leadership team: two with 1 percent annual growth and two with 2 percent annual growth. Within those overall targets, we focused on one model with growth primarily in the number of new freshmen and one that relied on an increase in the number of transfer students. Ultimately, a model that projected 2 percent overall growth primarily of transfer students and spring enrollees was presented to the board of trustees for approval.

Next Steps

Even a well-developed strategic enrollment plan should never be considered complete. As soon as the final enrollment figures for the year are determined, the task force should begin its analysis and evaluation for the following year. While a plan may have outlined enrollment targets for five or even ten years out, no projections will be perfect, and evaluation for the upcoming year and beyond is critical. The most important questions to answer are whether enrollment goals were met and whether the model assumptions held true. At my institution, the year one evaluation indicated that we had not accurately predicted the number of students who would return for a ninth semester or the number of former students who would return; this resulted in an unintended fall enrollment increase. It is also critical to ensure that the resources needed to support enrollment growth (*e.g.*, faculty, classroom space, etc.) have been or are in the process of being provided. Finally, what changes need to be made to the enrollment model for the upcoming year? If the model failed to predict enrollment patterns, determine whether those patterns were anomalies or if the model needs to be adjusted. As important as the initial planning is to an effective enrollment plan, so the subsequent analysis and adjustment is at least as—or potentially even more—critical to your success as an enrollment manager.

Conclusion

There is no right or wrong way to write an institution's strategic enrollment plan. That said, be sure to write it in a way that clarifies and supports the institution's enrollment goals. The important part is to establish what will and won't be addressed; then get it done! In fact, the best enrollment plan will be a living document that evolves over time and adapts as the institution grows and matures. You'll likely make a few mistakes along the way (I certainly did), so fix them and move on. The key is to write something that's usable and then to use it as the framework for enrollment-related decisions into the future. Let it be your blueprint for progress.

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WICHE. *See* Western Interstate Commission for Higher Education.

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