

 SEMQ REVIEW

Strategic Enrollment Planning: A Dynamic Collaboration

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Reviewed by John Soltice

The third edition of *Strategic Enrollment Planning* does more than just build on the previous two editions. This new and expanded edition includes the same chapter topics, plus a new chapter, but almost all with different authors, some of whom wrote other chapters in the 2nd edition, writing under very different circumstances compared to the previous edition in 2016. Since then, U.S. institutions face new or greater challenges in the economic, demographic, social, and political arenas caused by or exacerbated by a multi-year global pandemic. Plus, each chapter author this time was asked to “think from a DEI framework” when writing their chapter, and this is evident in several areas.

After a necessary context-setting introduction in chapter one, chapters two through eight give the fundamentals of the strategic planning process (SEP) itself, while chapters nine through fourteen read more as a primer on the standard pieces of strategic enrollment planning, ending with conclusions in chapter fifteen. Aided by plentiful data tables, colorful and at-a-glance

graphic illustrations throughout, and more than 100 references, this book is a vital guide to the strategic enrollment planning process and its key traditional elements. I appreciate that the book makes sure to distinguish SEP as distinct yet related to SEM, particularly in chapters two and eight.

In the title of chapter one, *The Future of Higher Education and the State of the Strategic Enrollment Planning Imperative*, the use of the word “Imperative” is deliberate. If the last ten years were the most challenging ever for U.S. higher education, the book predicts the next ten will be at least as challenging. Providing data from 2000 and forward, this chapter gives concise, yet breathtaking multi-decade spanning data tables and summaries often leading to humbling predictions about economic, demographic, demand, and competition trends over the next decade. This of course helps stress the importance of SEP, to optimize when you can, and to watch for areas of opportunity such as in the area of new programming.

Chapter two, *Building a Culture of Strategic Enrollment Planning*, takes on the challenging topic of building campus culture around strategic enrollment planning and is heavily referenced with strategic planning literature. Fundamental to SEP, this topic is appropriately placed at the front of the book. It notes how too many institutions overlook proper SEP, produce poor quality plans, or abuse the process to delay making decisions. The chapter describes common flaws in planning, then goes into length on the important relationship between SEP and other “interconnected plans including academic, co-curricular, fiscal, fundraising, technology, facilities, and research.” The chapter provides a summary of what makes excellent enrollment plans and outcomes based on fifteen years of reviewing a high number of enrollment plans. A key observation finds that such planning, if well thought out, is: inclusive of stakeholders, data-informed, done almost passively, and the best time to look at shifting to a “culture of SEP.”

With the current context established in chapter one and the foundations of planning, stakeholder engagement, and campus culture in chapter two, chapters three through eight take the reader into the book’s core section on SEP. Chapter three, *The Planning Process*, is actually more of a warm-up to chapters four through eight by walking the reader through an overview of the respective four phases of SEP: preparation and data analysis; strategy development; plan formation and goal setting; and implementation and ongoing analysis. Such a warm-up is perhaps wise heading into four chapters that are content-heavy, longer, and vital to SEP.

As a data professional, chapter four, *KPIs, Data Collection, and Situation Analysis*, has to be one of my favorites. It champions the importance of data in SEP, building a data-informed culture, as opposed to a data-driven-culture, and data’s relation to setting key performance indicators (KPIs) to “measure the success of the fulfillment of the institution’s mission and vision. KPIs have to be set before goals are set. A helpful list of potential KPIs by theme is provided, followed by a section on data collection and data analysis, and finally how they lead into an effective situation analysis of one’s institution.

Chapter five, *Strategy Identification and Development*, flows naturally from the previous chapter leading to the pivotal question of, which strategy will move an institution from its “current state to its desired state?” The chapter proposes utilizing carefully chosen working groups to work within the ASO methodology (assess, strategize and operationalize) and limits use of the ASO here in terms of sections along the enrollment funnel. A handy table of 52 examples of working groups, across four themes, highlights *some* of the many options, but at the same time goes to show the challenge of choosing which are the best ones to set up for an institution’s journey through SEP. These groups then rely on the situation analysis (ch.4) to grow a strategy or strategies to choose from, which the chapter gives an analysis framework for choosing. A final section reminds us, again, of the importance and value of setting strategy before goals. Research cited in the chapter identifies many perils when institutions pursue the reverse order.

Chapter six, *Integrating Academic and Co-Curricular Programs*, at first seems out of place given how the previous chapter ended (strategies, then goals) and because the topic is about current students, retention, and graduation rates. However, the chapter explains how, in a time of shrinking student supply, it is important to include in planning how you will work to keep the students you have (through effective programming), and how research shows the power of attracting new ones with targeted programs they want (through attractive programming) in a time of fiscal restraint. This all requires a lot of data and research, of course, causing this section of the chapter to move into a somewhat business-minded conversation on topics such as markets, supply and demand, costs, and revenue. Armed with this information there are four quadrants to organize current and potential academic and co-curricular programs. What follows are literally pages of important questions for SEP professionals to self-ask about their institutions in order to help build an academic program strategy, then a co-curricular strategy, and finally engage in integrated planning. Such a lengthy process is daunting, so I appreciate the three case studies of successful integrated planning at various institutions.

Chapter seven, *Establishing Enrollment Goals and Identifying Return on Investment*, is the longest chapter in this ‘core’ section of the book and rightly so. Goal setting can remain one of the most challenging steps for SEP leaders; however, we are rightly reminded how completing steps and processes covered in chapters four and five can help inform goal setting. This chapter is heady and void of the usual colorful graphics save for the four-quadrant Ansoff Growth Strategy Matrix. Now we can better understand why it was previously introduced in chapters five and six—so we can use it here as a tool to organize goals under four basic strategies (market penetration or development, or program development or diversification). With this framework, the chapter walks readers through three helpful case studies. The remainder of the chapter looks at how to calculate ROIs—both traditional as well as newer social ROIs, which the writers see as increasing in frequency at higher education institutions, as well as how to structure, write, and produce the SEP document itself.

Chapter eight, *Plan Evaluation, Modification, and Continuation*, is relatively short, but no less important than others. The chapter explains how to first develop a plan to evaluate the SEP *before* implementing it, and then the key transition to SEM to manage the implementation of, and potential changes to, the SEP. Two short vignettes are given with a somewhat light lessons learned paragraph and a brief discussion on evaluation dashboards.

Chapters one through eight organically flow from one to the other from a general/high-level to a granular/ground-level discussion of SEP from inception to implementation. The book could end here and be called a success. What follows in chapters nine through fourteen are somewhat stand-alone, longer chapters on various planning functions pursued by higher education institutions. While not core to the strategic enrollment planning process per se, they need to be understood and carried out for a strategic enrollment plan to be successful.

Chapter nine, *Marketing Strategy and Positioning*, is rich with overviews and accompanying illustrations on brand, marketing channels, audiences, student decision-making, choice, and enrollment marketing. Chap-

ter ten, *Pricing: Creating and Harvesting Value*, felt cold and corporate-like at times but does spend time acknowledging the rising cost of college before heading into topics on tuition discounting, inflation, freezes, guarantees, differential pricing, and other pricing techniques. Chapter ten, and chapter eleven, *Financial Aid and Affordability*, in the 2016 edition were in one chapter of eighteen pages in length. The 2023 edition splits out the two topics, for a much longer combined length of 34 pages, so SEP/SEM professionals in these areas would find particular interest in this area of the book even if they read the previous edition. Topics include preparing a financial aid plan, price sensitivity, and communicating affordability. Chapter twelve, *Recruitment Strategies*, covers the basics of recruitment including newer sections on international student recruitment, adult student recruitment, and DEI in recruitment. Chapter thirteen, *Analytics, Insights, and Solutions to Improve Student Retention and Completion*, covers data-heavy material across sub-topics such as persistence, progression, retention and completion, all aided by case studies of planning at two different colleges. Chapter fourteen, *Attracting and Retaining Adult, Online, and Graduate Students*, at 34 pages long (much longer than the 21 pages in the previous edition), is a reflection of both the growth in size and demographic changes of these groups of these student learners today, as well as the need for institutions to find new or larger revenue streams. Institutions need to be even more flexible, intentional, and nimble when considering these groups in their enrollment planning. The chapter cannot stress enough the need for solid research into understanding these markets across marketing, recruitment, yield, retention, and student success planning efforts.

The closing chapter, *Lessons Learned*, provides a concise summary as well as a discussion about readiness for SEP at the leadership level and readiness for change, data, and workload. This discussion is supported by several mini-case studies.

Overall, *Strategic Enrollment Planning*, is a well-written, resourced, and referenced book that emerging or current SEP professionals will find useful, even if they have read the previous edition. There will always be the

same core SEP “nuts and bolts,” but it is the contextual layers around it that vary over time. Thus, the many topics in the books wisely evolve with each edition to

help us keep up, adapt, and respond to the never-ending evolution in higher education and the pressures it faces.

About the Author



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