

 THE RESEARCH AGENDA

Charting a New Course: The Birth of the Nation's First Enrollment Management Credential at the University of Miami

By Tara Hornor and Christopher W. Tremblay

This research study examines the establishment and evolution of the first enrollment management credential in the higher education field 25 years ago at the University of Miami. Interviews were conducted with the program's current program director and the two pioneering administrators who created the program. The study also employed an alumni survey as well as document analysis of University of Miami Factbooks, enrollment management course syllabi, and program reviews. Results provide valuable insights about enrollment management graduate education, including the emphasis on incorporating high impact practices, focusing on practical applications, and infusing predictive analytics.

It all started 25 years ago at a colloquium titled *Charting a New Course*, at the University of Miami. It was then when the decision was made to develop the nation's first and longest running enrollment management credential (Hossler 2004; Huddleston 2000; University of Miami 2015). It was wintertime, and the colloquium drew a large attendance of notable scholars in the higher education field. The consensus from these scholars confirmed what the University of Miami already knew—there was a need for graduate education in enrollment management. The university was prepared for this pivotal moment. Enrollment management was already being intensely discussed and philosophized on by campus leaders which supported the need for

academic preparation in enrollment management (Orehovec 2023).

This research study examines the establishment and evolution of that first enrollment management credential. Interviews were conducted with the program's current program director, Dr. Carol-Anne Phekoo, as well as with the two pioneering administrators who created the program: Paul Orehovec, former executive vice president for enrollment management and continuing studies, and Dr. Scott Ingold, former associate vice president for enrollment management and registrar. The study also employed an alumni survey, as well as document analysis of *University of Miami Factbooks* from 1999–2024,

enrollment management course syllabi, and the higher education program's 2015 Graduate Program Review.

Paul Orehovec (2023) described those early philosophical discussions about enrollment management:

Everybody used it in terms of an organizational chart, not a philosophy. And that is what I wanted to change so that people who were connecting with students all became part of enrollment management, whether organizationally they reported to enrollment management or not. As things would have it, I became the Dean of Enrollment Management and Vice President, and I had the opportunity to take action.

Orehovec (2023) elaborated:

At the University of Miami, we were raising questions and taking actions that did not appear to be on the radar anywhere else in the country: Why was the enrollment management focus solely on student recruitment? What were we doing to improve the relationships and success of current students? Why wasn't everyone at the University invested in the recruitment, retention and success of students? Why wasn't the enrollment management organization expanded well beyond its own reporting lines? How might we blur the lines so that everyone felt a part of the team?

Orehovec (2023) said communication and collaboration were critical in fostering a culture of enrollment management on the campus. He shared that in addition to his staff meetings with admissions and financial aid,

I would have a broader meeting with as many of these people as I could bring together. I put on 60 slides in 60 minutes. People stopped talking about it and began participating. Both of us [Orehovec and Ingold] thought, almost at the same time, "Why don't we start training people to go out into the world and spread the word?"

Ingold (2023a), who served as university registrar, then associate vice president for enrollment management, stated:

I was at an AACRAO conference and ran into Ernie Beals, who at that time was at Georgia State University and had

been part of The College Board out of Atlanta. Ernie did a presentation on developing a Ph.D. program at Georgia State in enrollment management. I chatted with him about it and asked if he would keep me apprised of how it was going. As it turned out, the State of Georgia did not approve the curriculum change, and he kindly sent me his curriculum.

Ingold and Orehovec developed a two-course enrollment management core sequence they would teach in the higher education master's program along with an enrollment management practicum. Ingold (2023a) shared,

We introduced these courses in 1997 and recruited people from different walks of life. Among our applicants were K-12 administrators, social workers, international language campus administrators, recent bachelor's degree graduates, current higher ed professionals, and more. We also handpicked several University of Miami employees in admission and elsewhere who we thought would benefit from an enrollment management academic background to support their practice. Our approach was to teach the philosophy and practice of enrollment management, instill its theoretical foundations, provide experiences in administrative offices in internships and practicums, and hire the best.

Beginning in 2006, the program offered students a choice of enrollment management (EM) or student life and development as their focus, with the opportunity to earn a credit bearing certificate. EM students gained a student life credential, student life practitioners an EM credential, and institutional research staff could earn certificates in either or both tracks. This degree program structure enabled students to earn certificates concurrent to their master's, thus earning a dual credential. It also ensured that participants would gain an understanding of EM principles and effective practice in each of the three program tracks.

Enrollment

Enrollment in the EM program has fluctuated over time, ranging from four to 28 students. Throughout the program's tenure, student enrollment has been stronger in the M.S.Ed in higher education than its companion

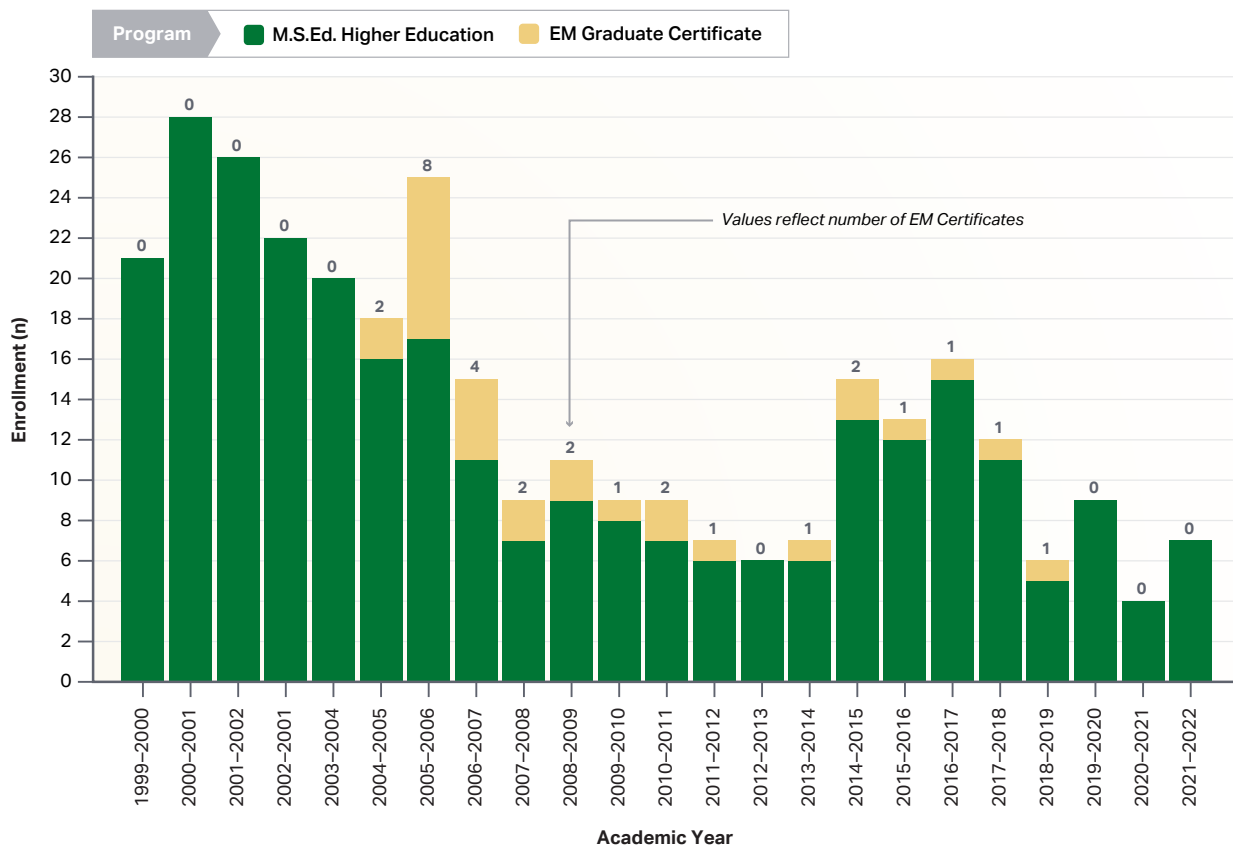


FIGURE 1 ▶ Student Enrollment

Source: University of Miami 2022

stand-alone enrollment management graduate certificate, as depicted in Figure 1.¹

Program Graduates

Graduations from the program have also fluctuated over time, ranging from two to twelve in a given year. The first five students graduated in 2001, two years after the launch. The program celebrated its 100th graduate in 2019. Student completions by year are depicted in Figure 2 (on page 20).

Curriculum

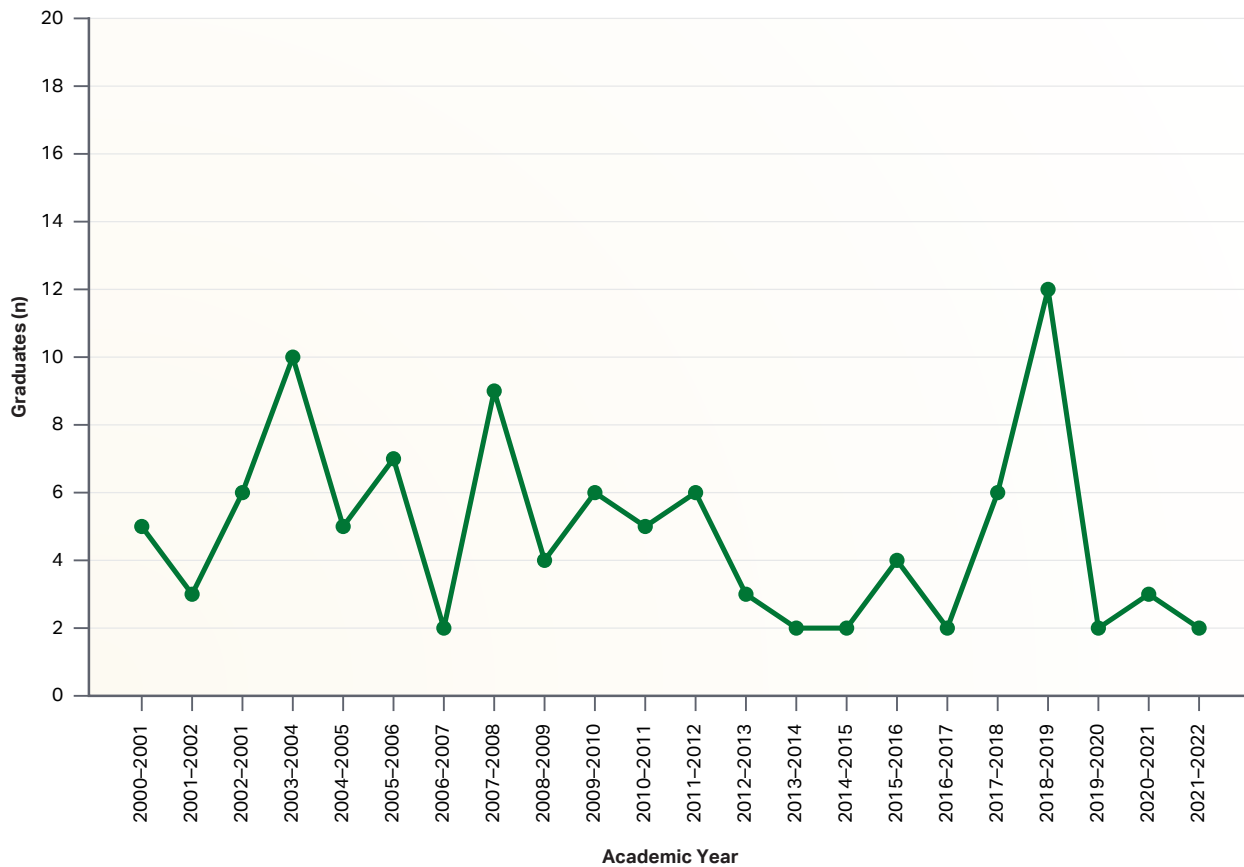
The University of Miami's enrollment management program was designed to educate students about the ho-

listic strategic enrollment management (SEM) process. Phekoo (2023) stated,

The enrollment management track instills the knowledge and skills to manage the enrollment process from inquiry stage to graduation and beyond via valuable alumni relationships. In addition to the fundamentals of higher education, we cover recruitment, marketing, predictive modeling, pricing, retention, contemporary issues in higher education, and the importance of communication and collaboration across office lines.

The EM program launched with several distinctive curricular features driven by the unique knowledge, skills, and abilities needed for effective enrollment management. These features included team teaching, guest lecturers working in the field, use of case studies, a required practicum, predictive modeling, and cap-

¹ Data provided in Figures 1 and 2 was the only publicly accessible data located on the University of Miami website.

**FIGURE 2** ► Graduates

Source: University of Miami 2022

stone projects. It is important to note the program was using a significant number of higher education high impact practices (HIPS), including capstone projects, internships, collaborative assignments, and common intellectual experiences, well before the term HIPS was officially coined (AAC&U 2024).

Designing the first enrollment management program in the country was not an easy task. Program faculty had to innovate and draw upon resources from other disciplines because textbooks on enrollment management did not exist yet. Ingold (2023a) shared,

The available resources regarding enrollment management have shifted dramatically since then. But in the early years, other than Don Hossler and articles here and there, there was not a great deal to use. So we considered applicable theories in other disciplines. We tapped into

psychology, sociology, business, and organizational development theory—all were useful because there are similarities across disciplines, and the difference is in how theories are applied.

In addition to numerous research papers, the program drew upon popular press books, including Jim Collins's (2001) *Good to Great* as well as John Kotter's (2008, 2012) *A Sense of Urgency* and *Leading Change*. The program later adopted Grawe's (2018) *Demographics and Demand for Higher Education*, John McGee's (2015) *Breakpoint: The Changing Marketplace for Higher Education*, and Hossler and Bontrager's (2014) *Handbook for Strategic Enrollment Management*.

The EM program is designed to broaden students' knowledge in multiple distinct areas of higher education. The program delivers on this broadening goal

by offering the dual credential, a master's degree and a graduate certificate, as described above. Layered on top of this exposure to varying functional areas in higher education is the use of the following distinctive curricular elements.

Co-Teaching and Guest Lecturers

The EM program initially used a team-teaching model to engage students in the curriculum. This was complemented by a wide array of guest lecturers from the enrollment management field. Document analysis of the Fall 2023 syllabus for the EPS 748 Enrollment Management: Theory and Practice course showcases integration of eight different guest speakers within the course. The EPS 748 syllabus also describes the rationale for scheduling presentations from practitioners “who can further expand on the practical application of the theories we will be discussing. This approach has been well received by students in the past and also helps to increase their professional network” (Ingold 2023).

Case Study Approach

Utilization of case studies is an extremely important element in the program. Orehovec (2023) stated:

Case studies helped generate discussion. I could ask people to play roles, for example. If someone was in admissions, I'd ask him to play the Director of Financial Aid or the Director of Student Employment. That helped get students thinking with a different focus and spark discussion. It was great—and a good deal of fun—seeing a student who was a registrar explaining how financial aid should run, for example. It gets people thinking in a much broader way.

Analysis of the Spring 2023 syllabus for the EPS 749 Advanced Seminar in Enrollment Management course highlights a robust integration of institutional EM case studies throughout the weekly readings.

Required Enrollment Management Practicum

The program also employs a required enrollment management practicum. Orehovec (2023) stated,

Much of what we did was research- and theory-driven, so the practicum put people in a position to experience an area hands-on that they were not necessarily involved with currently or in the past. The more we could do to expand their experience, the further along we moved them in the field.

The practicum is a comprehensive course in which students gain analytical and reflective thinking skills while participating in supervised enrollment management work for at least 140 hours per semester (University of Miami 2024). The practicum includes a weekly faculty-led seminar, which fosters an ongoing synthesis and analysis of classroom and on-the-job learning. The practicum culminates in a practicum project reflective written assignment as well as an oral poster presentation to a panel of faculty, practicum site supervisors, and alumni (University of Miami 2024).

Predictive Modeling

Predictive modeling plays a major role in the curriculum of the enrollment management program. This is a data-driven technique utilized in strategic enrollment management to help anticipate future enrollment patterns, predict student behavior, and develop personalized interventions to improve student outcomes (Osakwe, *et al.* 2023). Students in this program apply scenarios to datasets to examine the impact of different enrollment and financial models. Orehovec (2023) shared,

We had a great optimization program in which we could insert data and raise the question, for example, if we wanted more native students from the Midwest to enroll, what would we have to do, on average, with financial aid and scholarships and other determinants? Most of it was a financial mode.

The Spring 2023 syllabus for the EPS 749 Advanced Seminar in Enrollment Management course describes two major class projects involving predictive modeling and synthesis of theory and practice, culminating in an EM Project and a Retention Project with associated group presentations.

Capstone Projects

Over time, the EM program transitioned from case studies to focus more on a comprehensive capstone project engaging students in teamwork to develop a strategic enrollment management plan and use predictive modeling. The higher education program's 2015 *Graduate Program Review* report describes how the SEM plan is "based on a case-study institution that draws on their understanding of higher education, diverse college students and the college environment, sound research design, statistical analyses, marketing principles, financial management, ethics and the law." Students then present these SEM plans to a board composed of program alumni (University of Miami 2015).

Ingold (2023a) stated:

We would put together a fictitious institution that was struggling and provide the students a database. They could see how enrollments and revenues had fallen off. Teams would work to devise a strategic marketing plan to address the issues and provide appropriate forecasting to demonstrate how to move this fictitious school from folding to gaining viability. The students did a presentation as if they were consultants, offering findings and recommendations, all data-driven.

National Leader

Speaking to the philosophy and strengths of its higher ed program, The University of Miami's (2015) *Graduate Program Review* states:

The University of Miami is a nationally recognized leader in the study and practice of enrollment management, the first graduate program of its kind in the nation. In addition to a track in enrollment management at the master's level, the curriculum throughout the program is grounded in enrollment management theory, research, and practice. Enrollment management is an institution-wide approach that uses theory, research, and teamwork to recruit and retain students and support their academic success and psychosocial development through matriculation and beyond.

Explaining the program's description as a national leader in enrollment management, Orehovec (2023) stated:

Our perspective is that enrollment management is much broader than the admissions office and student recruitment; it encompasses every stage of the funnel, from prospective students to alumni. Therefore, we believe individuals across the university have roles to play in enrollment management.

Phekoo (2023) shared:

Whenever I provide references for students or meet people at conferences who have employed our graduates, I hear about how outstanding they are in the workplace, how much their work is influenced by research and theory, how they're able to apply and articulate the connections to research and theory when they make suggestions or recommendations for improvement. So I would say the national leader in EM label is due to the quality of our graduates and the work they do.

Ingold (2023a) added:

It's nice to be first out of the blocks on anything, and our timing was just spot on, as both the administration and faculty supported the program; the fact it married those two sides of the university broke down the traditional silos, in a way. But I think most important is that our graduates have gone out and done a good job.

Alumni Survey Results

This study also employed an online alumni survey with a series of eight questions designed to generate insight about participants' enrollment management learning experiences, how they have applied program content to their work, and their perceptions about the value of the EM program. The survey utilized open-ended questions. The survey was sent to 53 alumni (representing 50 percent of EM program graduates) who had current email addresses on file with the University of Miami. The other 50 percent of EM graduates did not have current email addresses on file. Twenty-nine alumni (55%)

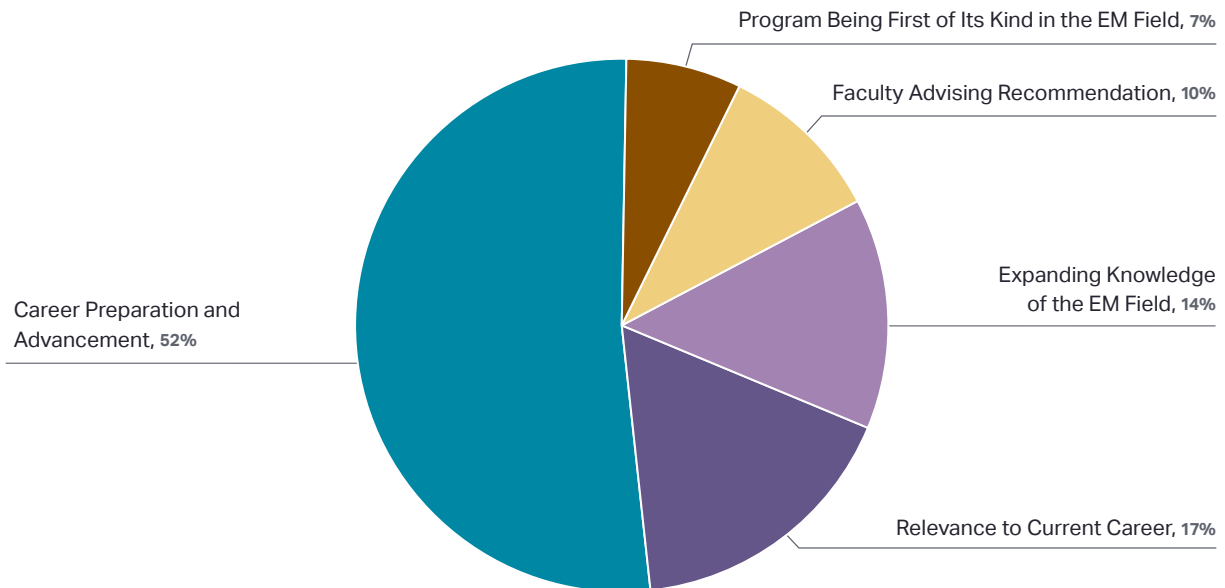


FIGURE 3 ► Survey Response: “Why did you pursue this Enrollment Management credential?”

participated in the survey. Participants’ graduation years ranged a 22-year span, including graduates from 2001 to 2023. Eleven alumni participants (38%) graduated during the first ten years of the program, and eighteen (62%) within the last fifteen years. Sixty-six percent of the participants reported they were not working in enrollment management when they entered the program.

Reasons for Pursuing the Enrollment Management Credential

The majority of alumni, fifteen out of 29 (52%), reported pursuing the program for career preparation and advancement opportunities as depicted in Figure 3. An alumnus stated, “I pursued this enrollment management credential primarily to enhance my prospects in the job market. I aimed to strengthen my resume and increase my competitiveness when seeking employment opportunities.” Fourteen percent of the alumni participants selected the program to expand their knowledge of the enrollment management field. Three of the four participants who pursued the program for this expansion

of knowledge specifically mentioned seeking a non-counseling-focused higher education program. For example, a participant shared:

I chose the program because I wanted a program that was not centered in counseling, like so many higher education and student affairs programs are. I wanted one that gave me perspective into how “the other side” worked and the non-academic departments and divisions should cohesively work together to fulfill an institution’s academic mission.

Seventeen percent of alumni participants enrolled in the program because it was relevant to their current career, as demonstrated in the following alumnus’ sentiment, “It seemed most relevant to the full-time job I had at the time.” Ten percent reported selecting the enrollment management program based on faculty advising, and 7 percent pursued the credential because it was the first of its kind in the field. For example, an alumnus stated, “It was also the first in the country, and it was exciting to be part of something new!”

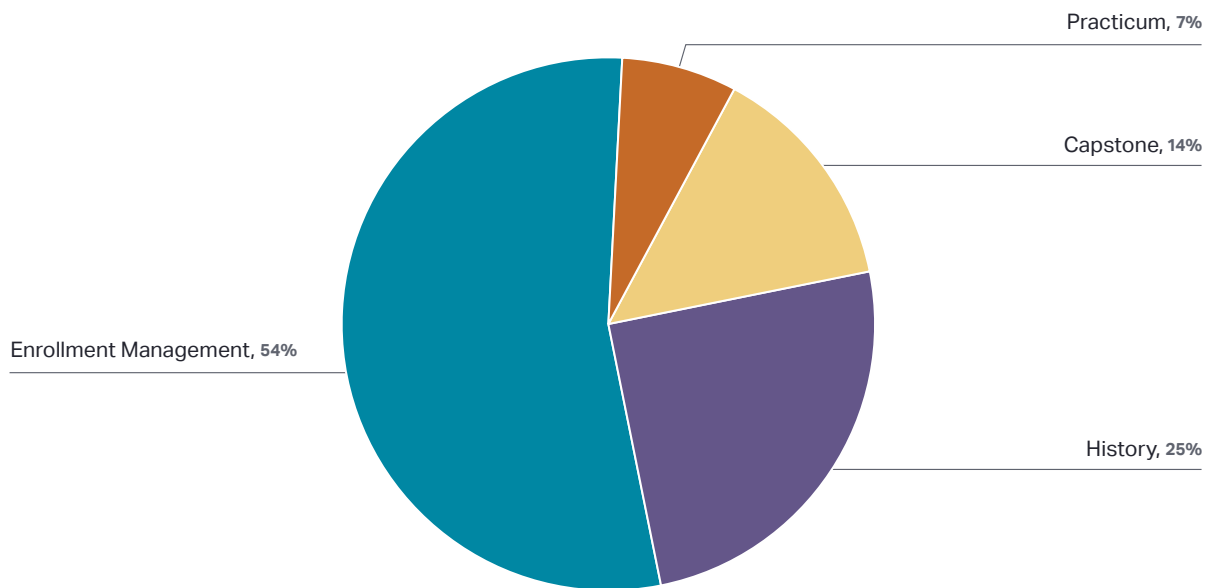


FIGURE 4 ➤ Survey Response: “What class was most memorable?”

Applications to Professional Work

When asked to identify the most memorable course in the program, alumni highlighted their enrollment management class (54 percent), higher education history course (25 percent), capstone experience (14 percent), and practicum (7 percent) as depicted in Figure 4.

More than 90 percent of alumni respondents (26 out of 29) report applying the content from the enrollment management credential in their professional work. One participant stated, “I have worked as a Director of Admissions now at two institutions and have utilized my knowledge to help forecast aid, develop recruitment strategies, and build admissions processes.” Similarly, another alumnus reported,

It gave me a greater understanding and perspective around why decisions are made at a business level, which trickles down impact structural decision making. It gave me the skills to understand how to and appreciate making a data-informed ‘business case’ for student programs—that typically did not have a business case—and advocate for

student soft skills using EM language university leadership cares about.

Many alumni also noted the applicability of the enrollment management program across higher education functional areas as depicted in the following participant statement.

Although my current role is in university housing rather than enrollment, I’ve found ways to integrate concepts from the enrollment management credential. Understanding how to engage students effectively has helped me foster a sense of community within the residence hall, ultimately contributing to improved student retention and enrollment rates.

Program Strengths

Survey respondents highlighted a wide variety of program strengths, including practical applications for the program, faculty expertise, curricular content, theory to practice focus, as well as program flexibility as depicted in Figure 5 (on page 25).

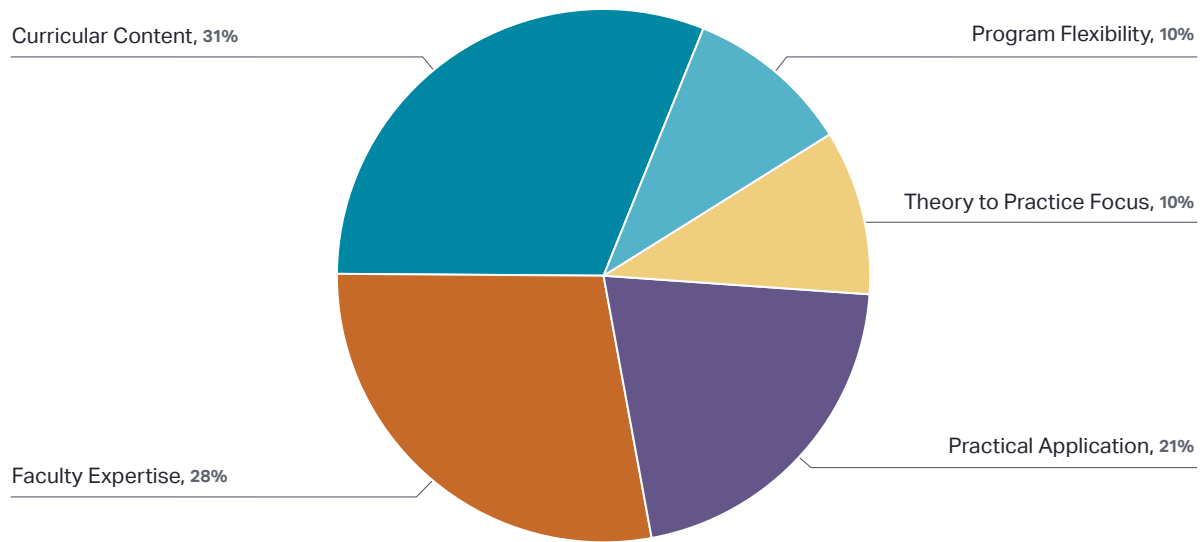


FIGURE 5 ► Survey Response: “What were the strengths of the Enrollment Management program?”

Thirty-one percent of alumni participants noted curricular content as a major strength of the program. Survey respondents commented on the relevance, comprehensive nature, and coverage of a broad spectrum of areas related to enrollment management. The inclusion of business courses and exposure to different higher education functional areas were also areas of the curriculum alumni appreciated. An alumnus stated, “It allowed us to learn more about the importance of enrollment management in higher education, which is beneficial when climbing the ladder in higher ed.” Another participant shared a similar sentiment:

I really enjoyed having the first enrollment management course being the focal point of the first semester and academic year of the program. This foreground really helped to guide my experience with the rest of the curriculum, my capstone project for my year-long practicum experience, and the comprehensive exam.

Twenty-one percent of participants reported practical applications of the material within the enrollment

management program as a major strength. Participants highlighted exposure to real-time situations, guest lectures from industry experts, and hands-on projects such as the capstone project and practicum as meaningful practical applications. A participant stated, “The strengths of the EM program were the practical applications that were brought in by the professors to understand how EM works in specific scenarios.”

Faculty expertise was also noted as a core strength of the program by more than 28 percent of alumni participants. Several respondents also highlighted the value of having professors who are also practitioners. One participant asserted, “One of the strengths is having professors who are also practitioners in the field as this helps gain a more well-rounded understanding of how to apply what we learn in class to real-world practice.”

Alumni also appreciated the program’s theory-to-practice focus, with 10 percent of survey participants rating this a program strength. For example, one participant stated, “The enrollment management program excelled in bringing theoretical concepts to life

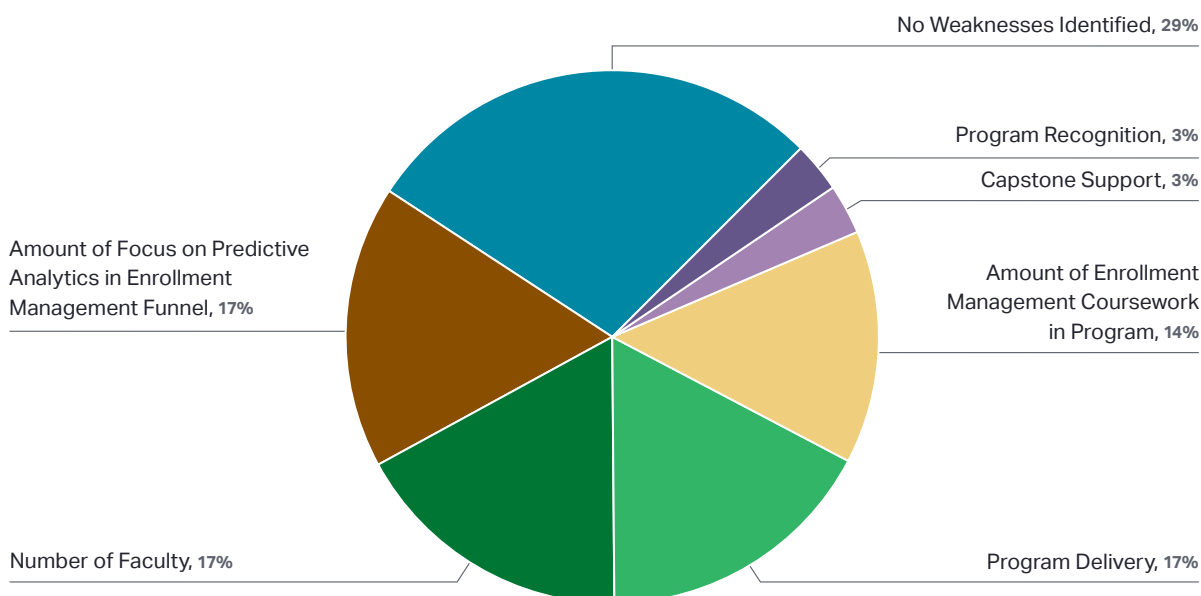


FIGURE 6 ➤ Survey Response: “What were the weaknesses of the enrollment management program?”

through engaging classroom discussions and real-world examples. The diverse range of stories shared in class deepened my understanding of the subject matter.” Program flexibility was also recognized as a strength by 10 percent of respondents. Flexibility in course delivery, such as hybrid classes and the ability to work while enrolled in the program, were noted as program strengths.

Program Areas for Improvement

Survey participants recommended several areas of consideration for program continuous improvement efforts, including adding enrollment management coursework, more content on predictive analytics in the enrollment funnel, and additional faculty members as depicted in Figure 6. Over a fourth of alumni (28 percent) reported there were no weaknesses associated with the program they could identify.

Fourteen percent of survey participants expressed a desire for the program to offer more enrollment management related courses. One survey respondent noted the program “could be more in depth, only had a couple of classes specific to the field.” Seventeen percent of

alumni also suggested the need for more focus on predictive analytics in the enrollment management funnel. For example, one survey respondent commented, “At the time I studied, I felt that there needed to be more emphasis on forecasting and creating models. I wish there had been a class on using Excel to create such models.”

Seventeen percent of program alumni also noted the benefit of adding additional faculty and enrollment management practitioners to work with the program. For example, an alumnus stated, “While the faculty were strong, there were so few of them, at least at the time I was in the program. There were times I wished I could have had more exposure to more faculty and practitioners.” This sentiment was linked to other recommendations from alumni, including program delivery and capstone support. A survey respondent also noted that the main weakness of the program is “not enough of the higher education community knows it exists.”

Value of the Program

When asked to describe the overall value of the program, alumni overwhelmingly identified two areas,

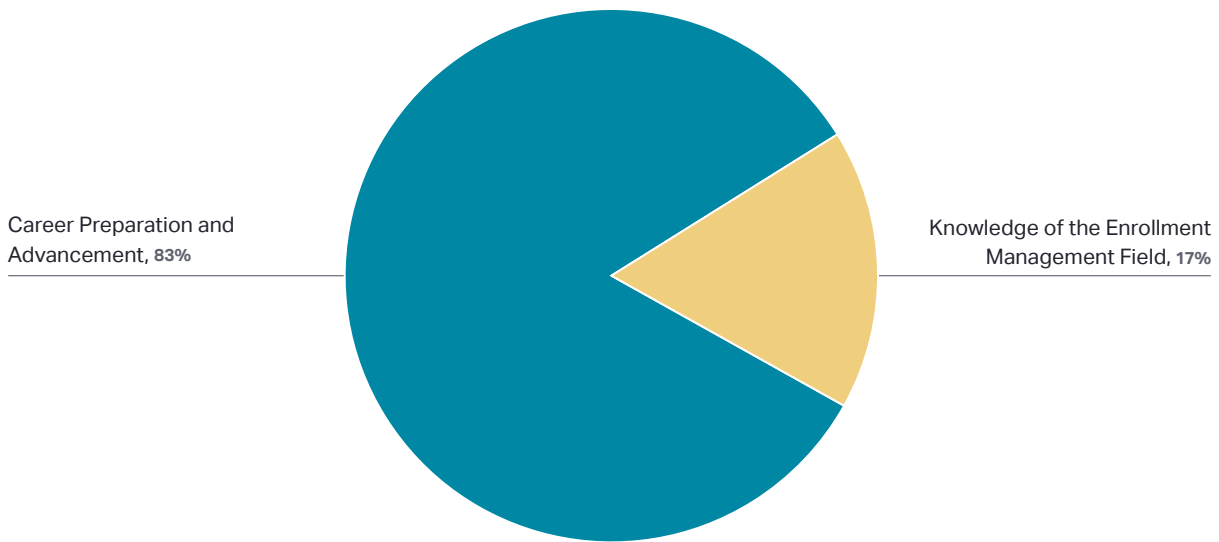


FIGURE 7 ► Survey Response: “Please describe the overall value of the program.”

career preparation and advancement as well as development of knowledge of the enrollment management field as depicted in Figure 7.

The vast majority of alumni (83 percent) expressed receiving significant value from the program for their own career preparation and advancement. One participant stated:

The enrollment management program has been immensely valuable to me. The reputation of the University of Miami and the program itself has undoubtedly opened doors for me in my career. Moreover, being taught by experienced professionals who actively work in the field has provided invaluable insights and knowledge, making the program incredibly worthwhile.

Similarly, another alumnus shared:

I think the overall program was timely and I felt confidently prepared to step into my next role having the enrollment management background. I also believe Enrollment Management continues to remain a crucial and relevant part of Higher Education Administration. The EM pro-

gram at UM was unique at a time when most programs focused only on student affairs development.

Seventeen percent of alumni described the value of the program in terms of how it fostered the expansion of their knowledge of the enrollment management field. For example, a participant shared:

Interestingly, it has been as I've progressed in my career that some of the things I learned during the program became more “valuable”—e.g., the admissions funnel. While I don't work directly in admissions, I am responsible for coordinating advising for all incoming freshmen, and understanding the application to acceptance to matriculation to enrollment and how yield rates vary has been helpful.

Likewise, another participant shared:

The EM program's value allows you to understand and apply complexities of the enrollment funnel to admission decisions. It is useful for any university administrator that will be working with enrollments or wants to know more about how administrators' decisions are guided.

TABLE 1 ► Colleges/Universities offering Enrollment Management Credentials

College/University	Credential	Year Started
Bay Path University and Ruffalo Noel Levitz	Certificate	2013
	Master's Degree Concentration	2013
Harvard University	Certificate	2024
Notre Dame of Maryland University	Certificate in Enrollment Management	2020
Royal Roads University	Graduate Certificate in Enrollment Management	2020
University of Miami	Certificate in Higher Education Administration/Enrollment Management	1998
	Master's Degree Concentration	1998
USC Center for Enrollment, Research, Policy, and Practice (CERPP)	Leadership in Enrollment Management Certificate	2012
	Master of Education in Enrollment Management and Policy	2018
Walden University	Graduate Certificate in Enrollment Management and Institutional Marketing ¹	Unknown

¹ Not currently accepting new students.

Discussion

Many implications for practice can be gleaned from University of Miami's partnerships between academic and student affairs functional areas. Orehovec (2023) shared:

If I had one piece of advice to give a new enrollment management dean or vice president, I'd say get your School of Business involved. I guarantee there's at least one faculty member who's deeply into predictive modeling because they're doing it for companies.

When asked why the growth in vice presidents of enrollment management positions added at universities hasn't translated to a greater number of enrollment management degree programs, Ingold (2023a) offered:

My speculation would be that there's probably not as strong a relationship between the administrative side of the house and the academic side of the house. I think that's a mistake, by the way.

Since the launch of the University of Miami's enrollment management credentials, other credentials have been established at other colleges and universities in the United States and Canada (see Table 1). These credentials

include general certificates, graduate certificates, and master's degrees concentrations. The most recent addition has been the 2024 Harvard University certificate for a "Leadership in Strategic Enrollment Management" weeklong program that launched in June 2024. All of the credentials are offered in the United States, except for the graduate certificate offered by Royal Roads University in British Columbia, Canada. Walden University's graduate certificate is unique in that it includes "institutional marketing" in the title. The University of Southern California's certificate is unique in that it includes a focus on leadership like the Harvard approach. The Bay Path/Ruffalo Noel Levitz credentials, which originated at Capella University, is also the only co-affiliated credential.

Future Research Studies

Future research on enrollment management graduate education could include studies of these other programs using similar methodology. This would provide helpful insights about the pedagogical techniques and curricular materials utilized within enrollment management graduate education programs. Future studies

incorporating current student feedback may also yield valuable information.

Conclusion

This research study on the establishment and evolution of the first enrollment management credential in the higher education field 25 years ago at the University of Miami provides valuable insights about enrollment management graduate education, including the focus on incorporating high impact practices, focusing on practical applications, and infusing predictive analytics (see Table 2). A future comparative analysis among all EM graduate credentials may add important information about the professionalization of the field and trends in EM graduate education. The establishment of an EM graduate education credentials consortium and panel at a future AACRAO SEM conference would also provide robust communication pathway for sharing best practices in EM graduate education. It is also recommended that AACRAO establish some curriculum standards for future enrollment management graduate education degrees and programs. These standards could then be implemented as a self-audit for the existing programs and help other colleges and universities launch potential similar credentials.

TABLE 2 ➤ Program Milestones for the M.S.Ed. in Higher Education Administration Degree

Year	Milestone
1996	Charting a New Course Colloquium
1997	First courses in enrollment management
1999	Enrollment Management focused graduate degree launches
2001	First 5 graduates from the enrollment management program
2019	EM program surpasses its 100th graduate
2024	25th Anniversary of the EM Program

As graduate education in the field of enrollment management evolves, a next step could be the establishment of a doctoral degree in enrollment management. It would make sense for one of the eight universities with these master's degrees and graduate certificates to house such a program. A program would add credibility to the enrollment practitioners already doing this important work.

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