

 LEADING STRATEGIES

The Role of Preplanning in Organic Strategic Enrollment Management

By Stefanie Ivan

Preplanning for Organic Strategic Enrollment Management (SEM) involves preparing for the transition to an organic, systematically-coordinated, and structured SEM approach that includes key elements of change management and change leadership. Four key elements of Organic SEM — efforts, to connect and effect enrollment, through linkages, and understanding enrollment influencers — will be discussed as precursors to the success of a SEM planning process.

Institutions of higher education must ensure readiness for change in order to have the best opportunity to succeed. Strategic enrollment management (SEM) planning often signals to an institution that a change is required: a move from the current state to a desired state with problem-solving processes in between (Herbst 1999). Setting enrollment management goals further signals a change to an institution whether the change is, for example, growth in enrollment, increase in retention, or even a change in strategy focus. SEM planning is not about the status quo; while some processes and traditions may be upheld, inevitably, to move an institution from where it is to where it wants to be, change will need to occur.

Early definitions of enrollment management by Dolence (1993) and Kerlin (2008) focus on planning processes and goal setting. Their definitions and other concepts of SEM often honor a process to assist institutions with their enrollment goals. Later discussions of

SEM by Bontrager and Green (2015) include concepts related to the organization, planning, and process of SEM. These conceptual discussions are more aligned with efforts, people, and processes; there remains, however, a gap related specifically to the importance of preplanning efforts in SEM.

In putting forward a concept of Organic SEM and the importance of preplanning as the precursor to effective SEM, the intent is to highlight key factors of preplanning as well as change management and change leadership principles. To enact effective and long-lasting change through SEM preplanning, embedding principles of change management and change leadership will be demonstrated to be essential. Organic SEM will be introduced as an institution's efforts to impact enrollment specifically through institutional linkages in preplanning stages with key change management and change leadership concepts embedded.

Organic Strategic Enrollment Management (SEM)

Organic SEM is an institution's efforts to connect and effect enrollment through linkages—an understanding and appreciation of the necessary partnerships and interconnected relationships of the larger community of enrollment influencers, including students (prospects and current), academic areas, administrative areas, and external interest holders. The organic nature of SEM appreciates, and gives rise to, a systems connection—interconnectedness and coordination of the parts necessary in SEM. However, as those in the field will recognize, this does not always occur naturally and must be assisted by leaders and participants of SEM.

Organic SEM shares characteristics of organic management systems that desire innovation and change; flexibility, collaboration, shared goals, and communication/connections are essential characteristics within organic management systems (Burns and Stalker 1994) and will be demonstrated to be essential within Organic SEM as well. In addition, Organic SEM borrows from change management and change leadership to guide the work necessary in preplanning stages.

Brief Overview of Change Management Models and Change Leadership Concepts Embedded within Organic SEM

Change Management Models

While there are many approaches to change management, concepts from Kotter's Eight-Step Change Model (1996), Lewin's three-step model of change (1951) and Hiatt's ADKAR model (2006) will be the primary draws for Organic SEM. These three models have been chosen as they are traditional within the field of change management (FitzGibbon and Pohl 2023).

Kotter's Eight Step Model

Kotter's model of change recognizes that planned change can be challenging, and there can be common errors that lead to pitfalls when implementing changes; his eight-stage change model recognizes a sequential

process over a period to establish change while avoiding these pitfalls (1996). The stages of establishing a sense of urgency, creating a guiding coalition, developing a vision, communicating the vision, empowering employees, generating short-term wins, building on gains, and anchoring change in the culture complete the sequential change model.

Lewin's Three-Step Model

In Lewin's field theory model, unfreezing (the current situation), moving (changing), and refreezing (the new situation) are the three steps at the core of this planning model, which seeks to move to permanent change through impacting human behavior (Burnes 2019). Unfreezing includes re-education (Lewin and Grabbe 1945) and changing patterns of thinking as well as values (Benne 1976). Moving involves new forces pressing for change overcoming existing forces, and freezing is when there is permanent new behavior resulting in a change (Lewin 1944).

ADKAR

The ADKAR model is a linear model emphasizing organizational change through individual change in the steps of awareness, desire, knowledge, ability, and reinforcement (Hiatt 2006). The model considers barriers to change that may occur at each step of the process, how to understand the barriers, and how to navigate them (Creasy 2022). A study in Finland looking for recommendations for organization change leaders by Kazmi and Naarananoja (2014) found that through organizational change, there can be resistance to the change based on employee discontent, mistrust, emotions, and resistance to innovation. Their study recommended using ADKAR to mitigate the pain points to move forward with the change.

Change Leadership Concepts

There are similarly several change leadership concepts that could apply to Organic SEM; however, the following have been chosen and integrated for their adaptability to Organic SEM, contributing in terms of engagement of interest holders, authentic and transparent leadership,

communication and activities, collaboration and partnership, relationship building, and fostering a culture of change, especially through goal setting/shared visioning. Change leadership thought most impactful to Organic SEM is concentrated in the works of Buller (2015), Kouzes and Pozner (2019), and Schein and Schein (2021) and is highlighted as follows:

Buller

Buller emphasizes understanding the context of the change, communicating change effectively, using transformational leadership and goal setting/shared visioning to enact change and collaboration as means to promoting and sustaining change (Buller 2015).

Kouzes and Pozner

Kouzes and Pozner also acknowledge transformational leadership including authentic and transparent leadership to model the way for change. Like Buller, they also promote shared visioning, inclusion of interest holders, and collaboration (Kouzes and Pozner 2019).

Schein and Schein

Schein and Schein promote “humble inquiry” as a leadership approach built upon listening, building relationships, and furthering collaboration. It is a cornerstone of authentic and transparent leadership, which promotes engagement of interest holders (Schein and Schein 2021).

Background and Context to Organic SEM

The purpose of this discussion is to highlight the importance of preparing for the change of Organic SEM—“setting the stage,” so to speak, which includes key elements of change management and change leadership. Smith, *et al.* (2020, 32) points out that challenges identified generally as “blame” may negatively impact SEM change initiatives; the “blame” challenges include the large amount of time typically needed for SEM, complicated processes, costs, and resources required. Hyde (2018) as cited in Smith, *et al.* (2020) also includes other blames such as poor processes in key areas typ-

ically included in SEM plans (academic programming, administrative processes, marking, recruitment) and or poor data. Overall, there seems to be blame based upon lack of understanding of efforts needed to create and sustain meaningful and lasting SEM change—the time, the involvement, the detail, and so on. Ultimately, in preparing for SEM change, which includes awareness and/or urgency to the problem or issue, an idea common to change management may assist in counteracting these blames (Kotter 1996; Hiatt 2006).

The challenges associated with “poor data” (Hyde 2018 as cited in Smith, *et al.* 2020) may also be reflective not only of “poor” data or “lack” of data, but also clear evidence of the current state, or inclusion of, interest holders in the evidence-gathering stages. Overall, this may be a lack of understanding of the community of enrollment influencers by the SEM leaders or ignorance of the deep and interconnected relationships necessary for SEM planning. Therefore, the SEM effort, in the preplanning stages, must be informed through the community of influencers and those who are leading the effort. Sometimes, too, different perspectives about how to best connect and enrollment are not informed in the current enrollment context—at the institutional level and on a more competitive level locally, nationally, and even internationally. The SEM effort must begin with ways to level the playing field by sharing perspectives, broadening insights of all participants, and using the vast knowledge and information that varied interest holders have.

Pushback to SEM Planning

Neoliberalism

The rise of neoliberalism in higher education has divided academics against business-like forces currently experienced in higher education, such as increasing competition, markets, and performance-based structures (Shams 2019 and Winter and O’Donohue 2012). Neoliberalism includes these business-like forces as well as views such as students as consumers of higher education, greater accountability, and even forces such as privatization and commercialization. SEM planning

may be considered by some interest holders, faculty especially, as akin to a neoliberalism process that enforces business planning for enrollment due to these types of forces and, as a result, there may be pushback to SEM planning.

Non-System Views

In a podcast earlier this year, Brian Rosenberg, president emeritus, Macalester College, and author of *Whatever it is, I'm Against it: Resistance to Change in Higher Education* also put forward the view that faculty can often align themselves with the importance of their position—a part—rather than seeing themselves as part of the whole. He gives an example of a faculty member aligning themselves with the importance of their specific faculty position (say, a philosopher or a historian) as compared to a professor at the university (Usher 2024). This non-system view can negatively impact SEM planning and undermine the interconnectedness of the parts that is essential.

Past Experiences

Sometimes experiences with SEM planning have not led to positive outcomes or been viewed favorably within an institution. Canadian SEM leader reflections highlight that past experiences with SEM connote negativity with the phrase “strategic enrollment management,” and SEM planning has been tainted with associations of narrow planning context and shallow institutional understanding (Smith, Gottheil, and King 2022).

The historic problem of “somebody else’s problem” may also contribute to SEM pushback. This viewpoint fails to recognize the systematic nature of SEM and the interconnectedness of the institution.

Organizational Culture

An organizational culture may not understand invisible assumptions that impact the culture (Schein 1985). Not taking time to uncover assumptions related to SEM planning (for example, thoughts of who will be included or that problems with enrollment are because of a certain issue) can stymie understanding conducive

to SEM preplanning. When an organization is not properly prepared for SEM or when there is lack of understanding of what it is, the organizational culture may be not be supportive of SEM efforts (Smith, Gottheil, and King 2022).

Further, as SEM involves collaborative efforts related to processes and resources that will be required for the best SEM efforts, there may be fear of what the change may mean for interest holders and their departments/units or fear that the change may be difficult because it requires new concepts, working within unfamiliar groups, working with unfamiliar processes, and so on (Schein quoted in Buller 2015). Perhaps, too, there are values that are misaligned within the institution—what is valued institutionally is not valued departmentally and vice versa. These fears and misalignments can dampen SEM efforts.

Preplanning Stages of Organic SEM

Macro View

Lack of time and awareness to prepare for the changes that SEM itself will bring, or not treating SEM itself as a change process, is a gap that needs to be addressed. This is a key reason for the creation of an Organic SEM model which, as it unfolds, provides emphasis on various elements of SEM preplanning. The four elements of Organic SEM and preplanning efforts for the success of the initiative are effort, connections to impact the enrollment effort, clear linkages, and partnerships and relationships. Each of these four elements is embedded within the concept of “organic” which requires systemic and fundamental coordination (see Figure 1, on page 53). Together, these four elements of Organic SEM create the precursors to effective management of the SEM change—the movement to the desired state. The elements work to mitigate the concerns and challenges as described above. Ultimately, without preplanning with a lens of change management and change leadership, these SEM leadership challenges can prove insurmountable—in some cases stalling SEM efforts, in other cases not leading to the desired outcome(s).

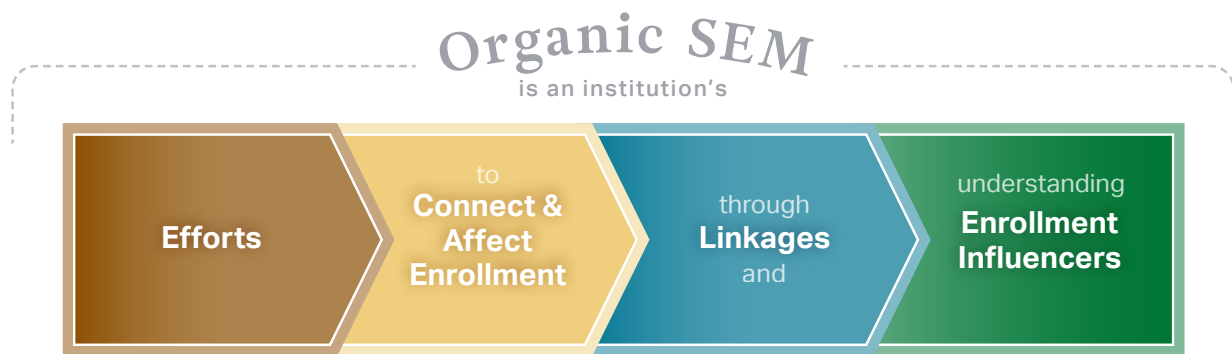


FIGURE 1 ► Macro View of Preplanning Efforts for Organic SEM

Micro View

A micro view of each of the four elements of Organic SEM that will contribute to the sustainability of the desired change itself are highlighted in Figure 2 (on page 54) and are described as follows.

- The first of the four elements is SEM preplanning *efforts* which includes making/taking time, preplanning, identifying interest holders, and sharing background and context to SEM planning.
- Next, *connecting and effecting enrollment* will be discussed as another element of Organic SEM which includes providing current state evidence and sharing a desire for the future state.
- *Linkages* will be introduced as the third element of Organic SEM with commitment to partnering/relationships, activities to understand SEM connections, working with the source, and active listening and inquiry shown to be essential for SEM preplanning.
- Lastly, *understanding enrollment influencers*, the last element of Organic SEM, will be introduced as including the necessity of SEM preplanning which includes evidence-based decision-making, more active listening, and participation in problem-solving.

Each of the four key elements of Organic SEM will be interwoven with the concepts from change management and change leadership that form the backdrop for a successful SEM preplanning approach.

The efforts necessary to lead to sustaining meaningful change through SEM planning must begin with efforts in the Organic SEM preplanning stage.

Make/Take Time

Organic SEM planning takes time. The efforts required to organize and plan SEM are often understated in organizational planning processes (Kotter 1996; Kotter and Cohen 2002). A knowledgeable SEM leader will assist by organizing and coordinating SEM efforts and allowing for the time it will take to prepare the institution for the change as well as enact the planning process, action planning, and evaluation/quality measures. However, it is in the preplanning of Organic SEM that the leader must be cognizant of the time resources and work with the institution to understand and make time for the same.

Preplan

Organic SEM requires forethought. It requires a systemic understanding of the whole and how to integrate the “whole” into the planning process. Ensuring a clear and shared vision for the SEM change—a clear desired state—helps interest holders realize the objective from the start (Bolman and Gallos 2011; Burnes 2019; Hiatt 2006; Kotter and Cohen 2002). The visioning is essential to both manage and lead the change.

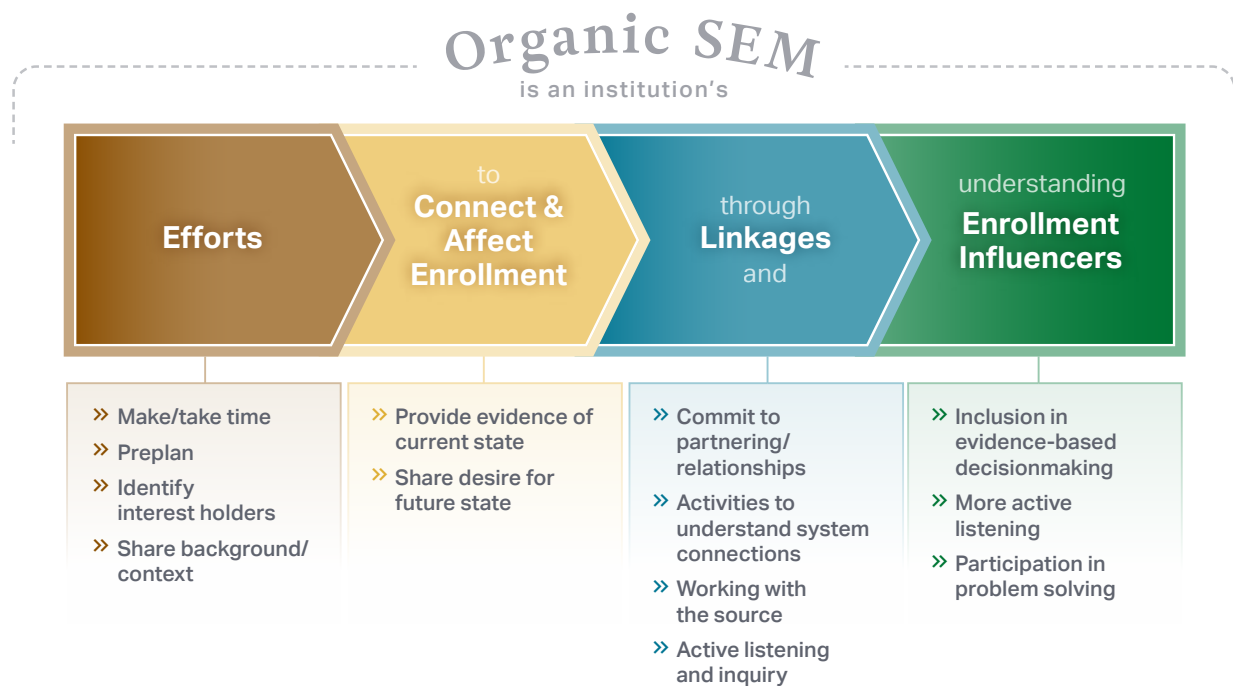


FIGURE 2 ► Micro View of Preplanning Stages of Organic SEM Efforts

Identify Interest Holders

While it is not unusual to consider who the interest holders are in SEM planning, it is not always an organic or systems approach to identify the interest holders. Often, SEM leaders stop short at who they know or believe are part of the SEM ecosystem, but the conversation must be extended through the levels of the ecosystem to ensure an organic approach—one that is interconnected through participants with relationships in SEM processes and planning. Also, once the interest holders have been identified, it is important to share who they are and their potential roles with institutional leadership and SEM sponsors. Sometimes leaders/sponsors may question involvement from certain areas or even themselves. If they cannot see themselves or key enrollment influencers as part of the Organic SEM planning efforts, it is important that the conversation is continued at that point. Interconnections and linkages of Organic SEM need to be understood and acknowledged through

the institution at all levels prior to SEM planning. The engagement of interest holders toward a shared vision through authentic and transparent leadership and communications are key tenets of change leadership that models successful change (Kouzes and Posner 2019). In setting the stage with Organic SEM, the emphasis is on the relationships and the interplay of parts to the whole in preparing for the enrollment change.

Share Background/Context to the Enrollment Situation

Using an authentic and transparent leadership approach, opportunities to engage in information sharing and dialogue related to the current enrollment context must be created for interest holders in the preplanning stage—waiting for SEM planning to occur may lead to some unnecessary concern. To be effective, a “telling-is-leading” approach (Buller 2015, 179) should be avoided, as this is a common pitfall of leaders in tradi-

tional SEM planning: they force a vision or desired state and believe that everyone will follow.

In addition, sharing evidence of the current enrollment situation is necessary. Before planning begins, this aspect of change management helps to create awareness (Creasy 2022) of the need and urgency for the change (Kotter 1996). This can also be likened to elements of “unfreezing” and “moving” in Lewin’s change model (Burnes 2019).

To Connect and Effect Enrollment

Organic SEM, due to the respect it pays to the interconnectedness of relationships and the system, also values preplanning to connect and effect enrollment.

Provide Evidence of the Current State

While the previous element also included background and contextual information, this second element offers an opportunity for a deepening of the evidence. Interest holders need time and space to hear the evidence, understand it, add to it, synthesize it, and organize it into digestible bites and meaningful information. Interest holders require time to ask questions. Building trust through authentic and transparent leadership and allowing for this time and space is an essential part of the collaborative change leadership approach in Organic SEM preplanning. There may be emotions and fears (Buller 2015) surrounding the initial reactions of the interest holders hearing the information, especially if it involves contentious enrollment information tied to the allocation of resources, doing things differently, or fear of budget cuts due to enrollment concerns. The knowledge to inform the change effort (Creasy 2022) and the empowerment (Kotter 1996) that can arise from the transparent and open sharing of evidence is a precursor to success in Organic SEM.

Assisting interest holders to understand any political, economic, technological, social, ethical, or other external drivers for the enrollment changes also adds to the awareness and urgency of the change (Kotter 1996) and should be a precursor to SEM planning as it helps to connect and effect enrollment changes that will be discussed as SEM efforts continue.

Share Institutional Desires for Future State (strategic plans, mission)

Similarly, allowing for the sharing of future state desires/goals and building common visions (Kotter 1996) is necessary. Hundrieser (2016) emphasizes the alignment of the plans, mission, and values of the organization and suggests that, to achieve the greater collaboration that is needed, significant engagement must occur. Beginning in the preplanning stage, this collaboration sets the stage for Organic SEM with connections and relationships being formed early; the trust-based relationship as the foundation of planning paves the way for the process instead of halting the process from the beginning because of low-trust or broken relationships (Hundrieser 2016). Examples of this include ensuring that there are direct linkages made between the mission, strategic plans, academic plans, financial plans, and other significant plans of the organization with the goals of SEM.

Through Linkages

Understanding and appreciating partnerships and interconnected relationships of the larger community of enrollment influencers in Organic SEM represents necessary linkages.

Commit to Partnering/Relationships

Working with leadership and executives to inform and nurture the importance of partnerships and relationships in the preplanning stages of SEM sets the stage for success. Purposefully creating environments for engagement across and through the institution, regardless of divisions, departments, organizational structures, or any such “silo” that may exist is important in SEM (Harvey-Smith 2022, xix). Doing this in the preplanning stages sets expectations for behavior, helping to build a culture for Organic SEM to succeed.

Harvey-Smith (2022) emphasizes the need for collaboration and cooperation (38)—what could be considered the very roots of Organic SEM and core to the onset of SEM planning. Kouzes and Posner would describe this change leadership philosophy where the actions of the leaders surpass more than mere words as “modeling the way” (2019, 5). Ultimately, if leaders and executives

understand and support Organic SEM relationships, there is a greater opportunity that those involved in SEM planning will as well. The support and commitment also work to foster engagement (Kotter 1996).

Create Activities and Opportunities to Understand System Connections in the SEM Ecosystem

Helping others to establish a vision and purpose for the change is common in change management (Kouzes and Posner 2019). Planning activities as a precursor in Organic SEM assists interest holders in understanding key relationships and/or interdependencies in the SEM ecosystem. Including varied interest holders in engaging activities like role playing SEM-related processes, and/or empathy mapping concepts, encourages them to work toward gaining greater appreciation for others and their roles/processes before SEM planning begins. Barriers to change that need to be navigated (Creasy 2022) through later SEM planning can also be identified early. These types of activities may also create awareness and desire to change (Creasy 2022) or assist with the unfreezing of the current situation (Burnes 2019). These types of activities can also help to understand the purpose for the change.

The outcomes of these preplanning activities can also help to create a shared vision which, in turn, can help with the management of change (Harvey-Smith 2022; Kotter 1996; Kouzes and Posner 2019). Harvey-Smith (2022, 39) also emphasizes vision, engaged leadership, clear goals, mission, vision, core values and strategy, decision-making engagement, listening, and compromise as essential to planning. Each of these works to understand connections and shared purpose in the preplanning stage and sets the stage for what is to come as processes begin to unfold; this encourages continuous learning and improvement and fosters higher engagement.

Active Listening and Inquiry

Relationship building with leaders and executives in the preplanning stage is one way to preestablish linkages in understanding and appreciating partnerships of the interconnected whole of Organic SEM. Schein and

Schein's (2021) art of "humble inquiry" is an approach focused on genuine interest and curiosity in hearing what others have to say rather than presuming to know the answer or direction that one must take. It is especially important in the preplanning stages of Organic SEM where one should desire to build transparent and honest relationships and gather evidence to inform upcoming planning. They refer to their inquiry as "behavioural agility" to understand the content of the inquiry, the format of the inquiry, as well as the approach of the inquiry (Schein and Schein 2021). Inquiring in ways that establish trustful relationships broadens conversations and allows for responses to questions that might not even have been asked (Schein and Schein 2021). From the onset of Organic SEM preplanning activities, this type of approach will begin to set the conditions for change and, again, help to create a culture more conducive to SEM change.

Understanding Enrollment Influencers

The influencers of enrollment include prospective and current students, faculty and program administrators, and staff in administrative areas such as the offices of the registrar, student services, finance, and housing, and external interest holders. Understanding these enrollment influencers is a necessary precursor to Organic SEM.

Inclusion in Evidence-Based Decision-making

Enrollment influencers are valuable partners who can help to inform the context for SEM planning in the preplanning stage; however, information from enrollment influencers can sometimes be introduced too late in the SEM planning process and not in the preplanning stages where other evidence is often gathered and presented as part of the critical background and context.

Evidence to inform SEM preplanning and planning can come from the interest holders directly—in combination with evidence from institutional data, external data, and other sources. Harvey-Smith (2022) suggests including information to, "build a culture of evidence and inquiry that permeates the institution" (99–100). Starting with this in the preplanning stage, with interest holders

who will help to lead Organic SEM planning efforts, will help establish a pattern of evidence-based approaches.

By including evidence and expertise early on from influencers, any individuals who are also key interest holders may be called upon to lead in later SEM planning—to form part of the “guiding coalition” (Kotter 1996). This evidence can also be used as part of SEM planning to inform barriers to change or other inquiry. This may help to reduce potential barriers to change that could occur because of non-inclusion creating discontent, mistrust, negative emotions, or even resistance to change (Kazmi and Naarananoja 2014).

More Active Listening

Again, using the concepts of humble inquiry as a cornerstone to building trustful and productive relationships is recommended as one way to gather evidence to understand enrollment influencers. Covey (1989) reminds us that it is human tendency to speak rather than listen: “Most people do not listen with the intent to understand; they listen with the intent to reply” (121). This is like closing your ears to the enrollment issues that others are trying to explain in SEM preplanning stages. And others will quickly catch on—either stop listening with the intent to reply and problem solve OR actively listen to inform the next steps in SEM preplanning. Working with the source—the interest holders directly—for evidence to inform approaches, ensures overall understanding and early buy in.

Allow Participation in Problem-Solving

Committing to include the influencers in the problem-solving through the early activities of SEM preplanning is also a key approach. This commitment should be shared as part of the preplanning process but ensured during the planning process itself. Examples might in-

clude activities to identify enrollment issues or process concerns or even identify their own systems contributions to the enrollment situation. This commitment demonstrates a culture of collaboration and relationship building as a precursor to SEM.

Conclusion

Preplanning for Organic SEM places emphasis on four components instrumental to the SEM effort. The emphasis on efforts/to connect and effect enrollment/through linkages and also understanding enrollment influencers allows for SEM practitioners to focus on core concepts of Organic SEM as well as key principles of change leadership and management as precursors for successful SEM planning.

Early engagement of interest holders through authentic and transparent leadership, communications, and activities, founded on principles of collaboration, partnership, and relationships, are key change leadership strategies. Engagement of interest holders using methods such as “humble inquiry” are helpful, as are attempts to create shared vision for the future of the change. These help to foster culture where preplanning for Organic SEM can occur.

Change management concepts that apply in the preplanning stage of Organic SEM are primarily drawn from Kotter’s model, Lewin’s model, and ADKAR and include awareness, desire, knowledge, creating urgency, creating a guiding coalition, creating vision, and unfreezing. Taking time to plan and ensure a culture of evidence and inquiry are also necessary to manage the change in preplanning Organic SEM. Individuals who understand the nuances of these and other change management and leadership concepts and approaches as key to the Organic SEM preplanning effort will be better prepared to lead and manage these efforts.

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Stefanie Ivan is an Associate Faculty member in the Master of Arts in Higher Education and Leadership program at Royal Roads University in Victoria, British Columbia. Ivan has an undergraduate Bachelor of Education degree, Secondary, from the University of Alberta, and a Master of Science in Education, Specializing in Enrollment Management, from Capella University. She started her career as a high school teacher in Red Deer, Alberta; however, her experience as a student leader and president of the Red Deer College (now

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Ivan was a faculty member in the adult upgrading and general studies programs, an academic advisor, coordinator of advising, then coordinator of student services. She moved to Grant MacEwan College (now University) as associate registrar, then registrar, and later associate vice-president student services. She consulted and was VP Consulting with Academica Group, traveling Canada speaking, leading workshops and

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