

Designing Your Enrollment Trajectory: **Analyzing, Strategizing and Operationalizing Towards Short or** **Mid Term Enrollment Planning Success**

Errol Wint

Principal Consultant for Enrollment Planning, IUPUI

Director of Undergraduate Admissions, IUPUI

Professor Youngbok Hong

Director of Master of Design (M.Des)

Herron School of Art and Design, IUPUI

Leadership Acknowledgement

"All Hands on Deck" Pandemic Call to Action at IUPUI

◆ IUPUI Cabinet Leadership

- **Dr. Nasser Paydar:** Assistant Secretary for Postsecondary Education at the US Department of Education (former Chancellor at IUPUI)
- **Dr. Kathy Johnson:** Executive Vice Chancellor and Chief Academic Officer
- **Dr. Camy Broeker:** Vice Chancellor of Finance and Administration
- **Dr. Stephen Hundley:** Special Advisor to the Chancellor for Planning and Institutional Improvement (former Interim Chief Enrollment Officer at IUPUI)

IUPUI Division of Enrollment Management

- **Dr. Boyd Bradshaw:** former Associate Vice Chancellor for Enrollment Management
- **Ashley Miller:** former Director of the Enrollment Strategy and Insights Team
- **Beth Knight:** Director of Enrollment Management Projects and Planning
- **Terry Brown:** Interim Director for Enrollment Strategy and Insights Team, IUPUI
- **Matthew Moody, Melissa Myroup, Bobby Bell:** Division of Enrollment Management Associate Director Core

Higher Education Enrollment Challenges

- ◆ Less students to recruit in the pipeline
 - ◆ Affordability issues
- ◆ Questionable value proposition within context
 - ◆ Education adjacent industry imposition
- ◆ Covert market adjustments from desperate competitor
 - ◆ Human and economic consequences
- ◆ Great Resignation impacting the quality and quantity of workforce

GRAVITY PROBLEMS: FACTS TO BE DEALT WITH RATHER THAN PROBLEMS TO BE SOLVED

New Student Beginner Enrollment: Gravity Problems Manifested

Factors of 2020 Cycle

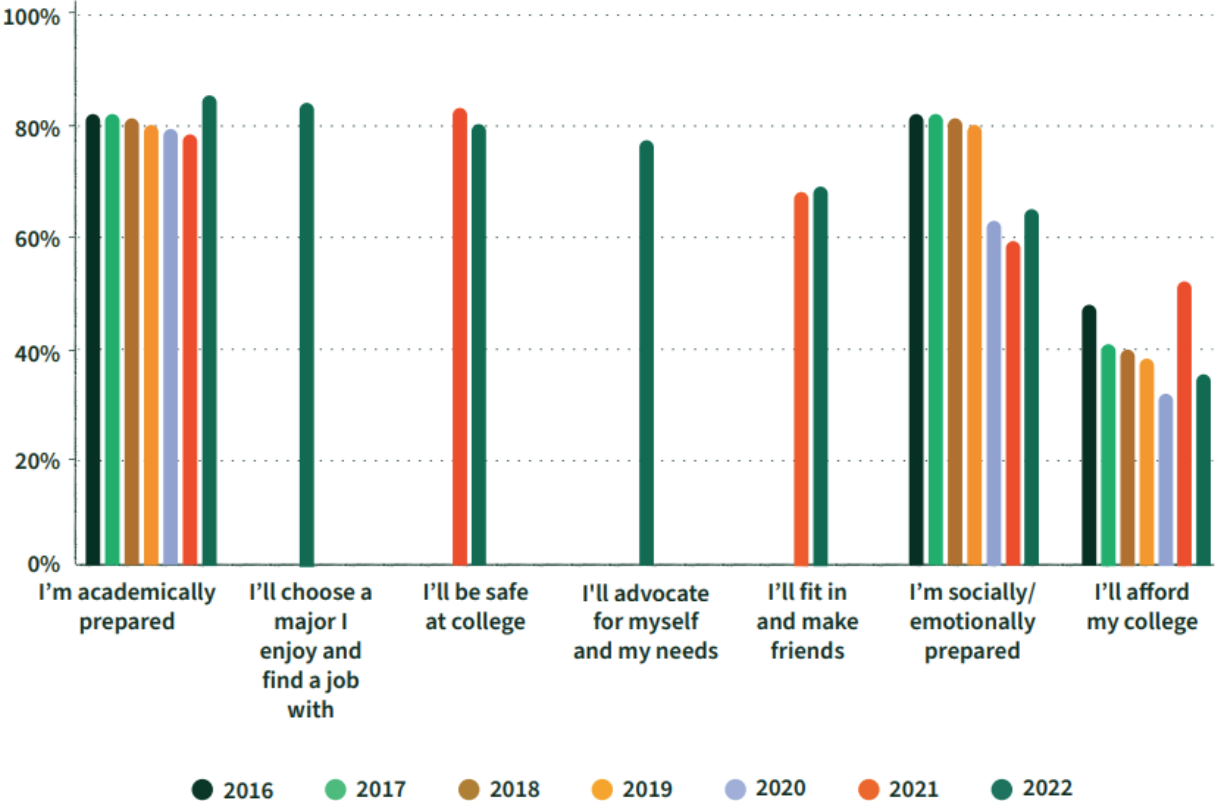
- ◆ Context: Shift from in person to 100% remote (high school and college)
- ◆ Emotional distress: loss of prom and graduation
- ◆ Lowest report of confidence in ability to afford college of all pandemic years
- ◆ Oversaturation of communication (e-mail)

Factors of 2021 Cycle

- ◆ Context: limitations to traditional recruitment practices, new tactics emerge
- ◆ Low confidence in academic readiness after e-learning
- ◆ Confusing landscape for test optional
- ◆ Higher desire for in-person visits
- ◆ Lowest report out of social and emotional readiness of all pandemic years
- ◆ Oversaturation of wider breadth of communication (e-mail, text message, mailing, letter)
- ◆ Affordability concerns expand

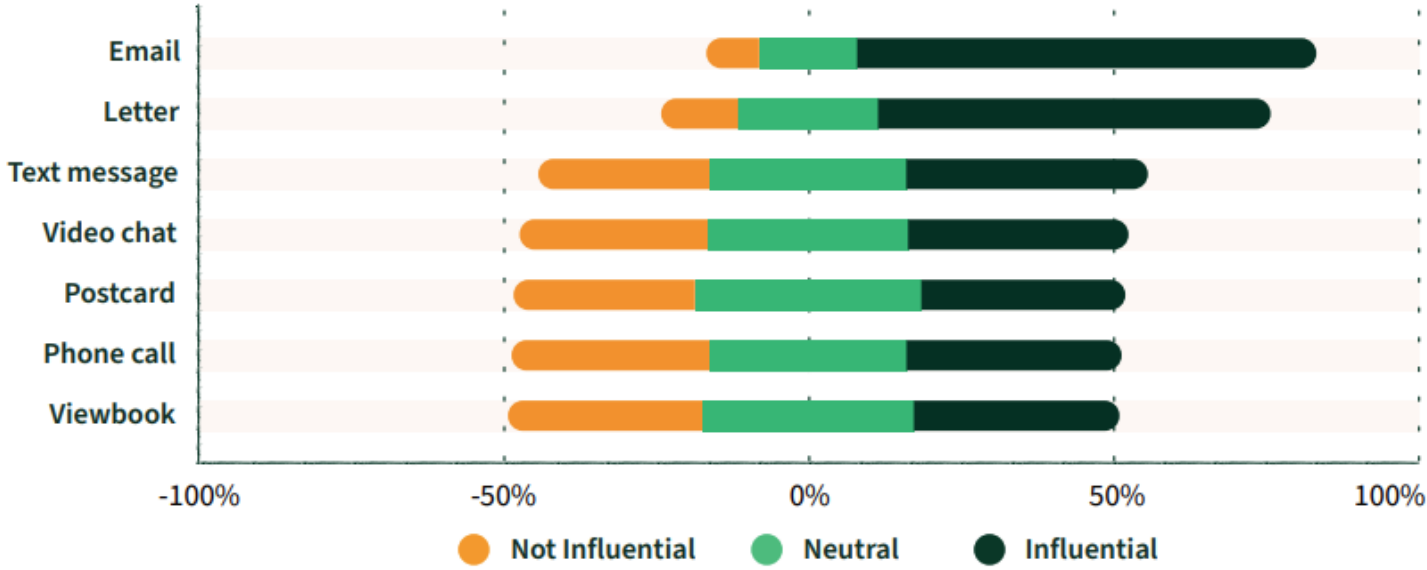
What Do We Know: Student Confidence Trends

Confidence trend



What Do We Know: Student Preferred Communication Trends

Influential Communication Channels

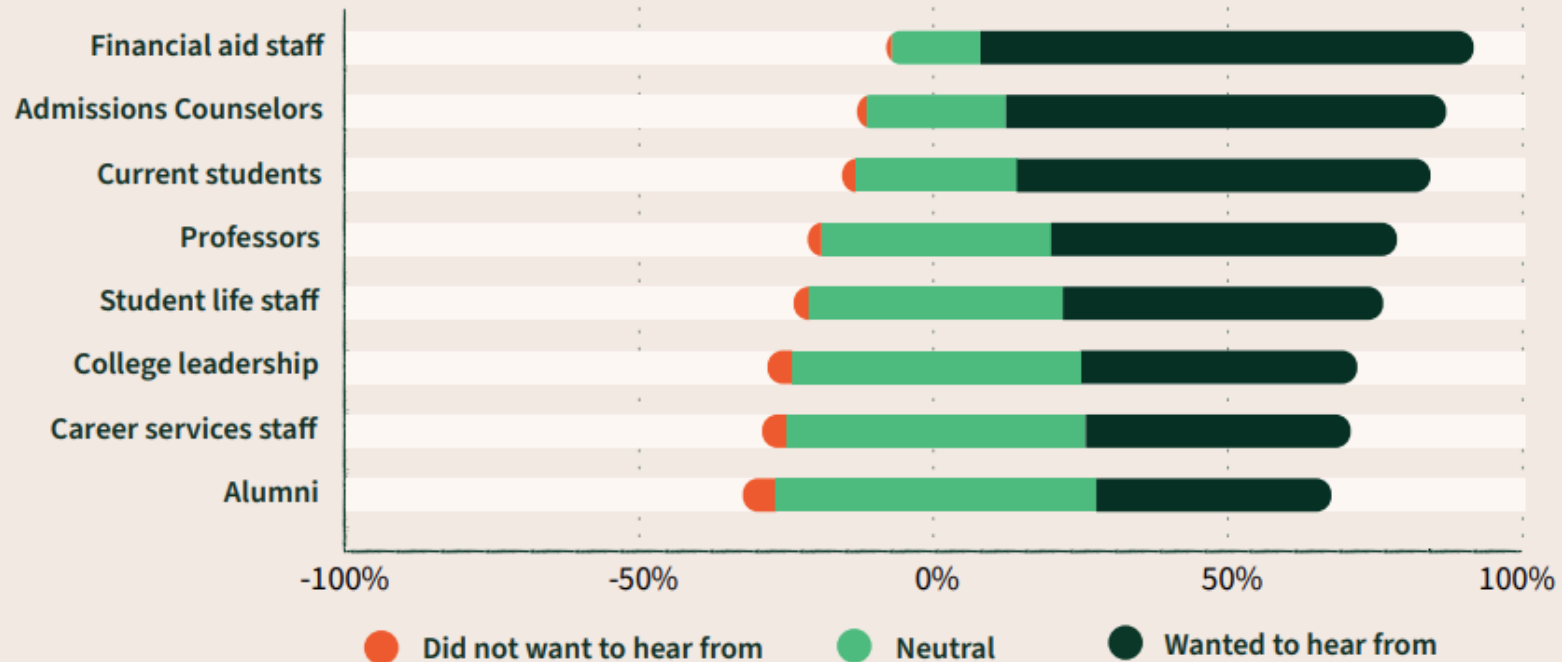


What Do We Know: Student Preferred Communication Trend

<input type="checkbox"/>	☆	»	Johns Hopkins Unive.	Collaboration meets innovation - What may seem like monumental projects are everyday triumph...
<input type="checkbox"/>	☆	»	University of Pitts.	A priceless experience - Automatic scholarship consideration is just one of the benefits of apply...
<input type="checkbox"/>	☆	»	BU Admissions	TONIGHT: Watch our virtual BU information session - TONIGHT: Watch our virtual BU informatio...
<input type="checkbox"/>	☆	»	Columbia-Sciences P.	Sunday Join Us in New York City - Upcoming Information Session and Campus Tour in New Yor...
<input type="checkbox"/>	☆	»	Virginia Wesleyan E.	Your Scholarship is Waiting - To view this message in your browser, click here VWU Batten Hono...
<input type="checkbox"/>	☆	»	University of Lynch.	Apply now for an admission decision by December! - Visit Our Website Lynchburg College A Nov...
<input type="checkbox"/>	☆	»	UK Lewis Honors Col.	Live with Lewis Honors College - Web Version Hey Future Wildcat! Have you heard about Kentuc...
<input type="checkbox"/>	☆	»	Matt Bodenschatz	A Fee-Waived Application When You Visit MAC! - To view this message in your browser, click her...
<input type="checkbox"/>	☆	»	LIM College	The perfect pair of jeans - or college - An education fit for the real world View this email in your ...
<input type="checkbox"/>	☆	»	George Mason Univer.	George Mason's Application Deadline is This Week - George Mason's Application Deadline is Thi...
<input type="checkbox"/>	☆	»	Hillsdale College A.	Charger Football & Volleyball G-MAC Champions - Celebrating Charger Athletes The Hillsdale ca...
<input type="checkbox"/>	☆	»	Mount Aloysius Admi.	Walk-ins are welcome at our Sunday Open House! - To view this message in your browser, click ...
<input type="checkbox"/>	☆	»	Otterbein University	December 15 Scholarship Deadline - To opt-out from future e-mail communications, please Uns...
<input type="checkbox"/>	☆	»	High Point Universi.	Last reminder for our Early Action deadline - You only have until November 15 This message wa...
<input type="checkbox"/>	☆	»	Tulane University U.	That's a Class?! - Get ready to go beyond calculus and American literature. ...
<input type="checkbox"/>	☆	»	Colby College Offic.	This Colby Life: Inside the Colby Experience - Colby students represent a wide variety of backgr...

What Do We Know: Students Preferred Human Contact Points

Who students want to hear from



Planning Through a Volatility: Understanding Students and Staff Alike

SPIKING CONFIDENCE

OVERWHELMED WITH COMMUNICATION

UNCERTAINTY ABOUT AFFORDABILITY

SELF DIRECTED AND SEAMLESS
DIGITAL EXPERIENCE

INDIVIDUALIZED FACILITATED SUPPORT

AFFIRMATION OF QUALITY OF
PRODUCT (ACADEMIC EXPERIENCE)

CAMPUS ENGAGEMENT AND SUPPORT
EXPERIENCE



Given the context, how might we.....

External

1. Establish more precision in data informed decision making around the recruitment experience (**efficiency**)
2. Increase analysis depth in decision making (**impact**)

Internal

1. Establish "buy in" to recursive cycles of prototyping, learning and improvement in relation to planning (**perpetual planning**)
2. Inspire a more engaged workforce, with meaningful collaboration across faculty and staff lines (**organizational health**)

Dr. Michael Crow

President of Arizona State University (Large Public)

Between 2002 and 2017, Arizona State University increased enrollment by 85%, from 55,491 to 103,530.

During the pandemic, achieved a 30% increase in Freshmen enrollment, and a 27% increase in diverse freshmen enrollment.

"Designing public institutions to serve public interest in rapidly changing society justifies rethinking the organizational logics that dominate higher education. Arizona State University's new logic—academic enterprise--- requires universities to turn their efforts from conserving resources toward maximizing them through careful investment"

Dr. David P. Haney: President of Hiram (Small Private Liberal Arts)

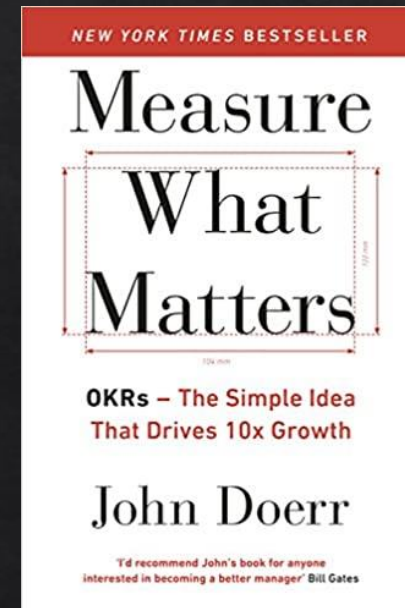
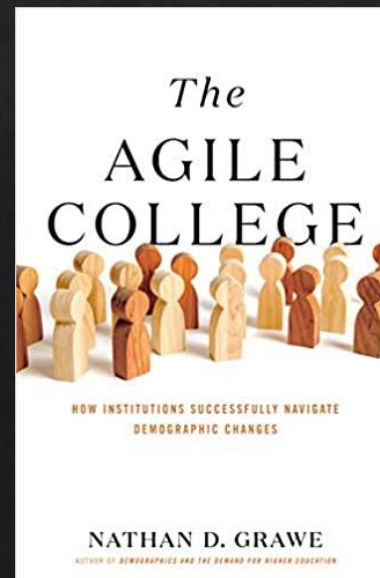
“The 2020-21 academic year was strongly impacted by the COVID-19 pandemic, but Dr. Haney was able to guide the College through a challenging period in Hiram’s history while ensuring the overall health and safety of the campus community,” said Scarborough. “The Board has also been impressed with Dr. Haney’s design thinking approach to evaluate and address the College’s areas of opportunity, positioning Hiram to better meet the needs of its students today and tomorrow.”

During his interim presidency, Dr. Haney worked to identify options for the most sustainable path forward for the College. The transition to a longer-term presidency will give him the opportunity to help evolve current initiatives and develop long-term strategies for new academic offerings, enrollment marketing, transfer student articulation agreements, community engagement, diversity and inclusion, campus sustainability, and financial stability."

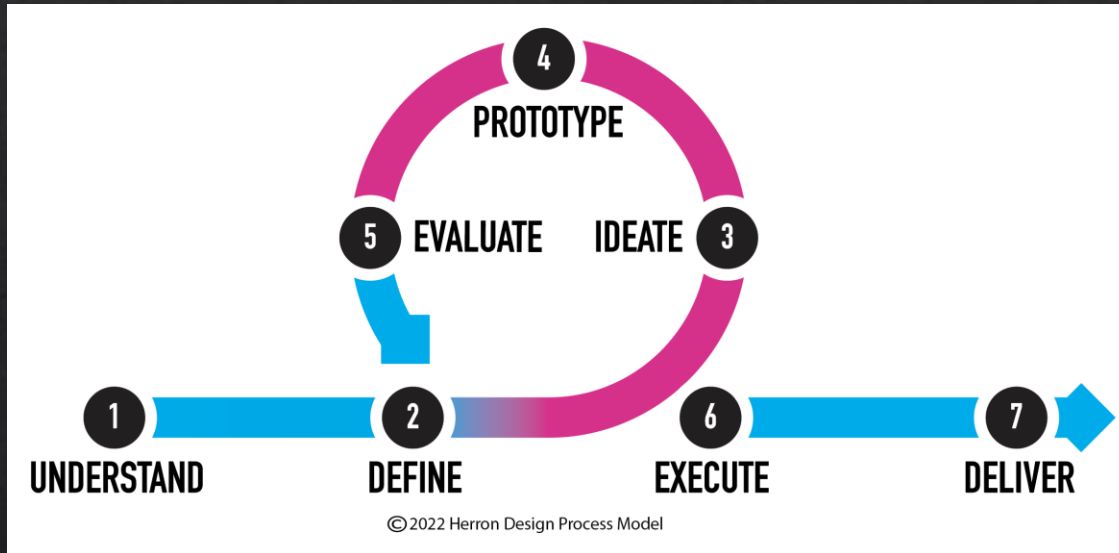
Dr. Haney's Results Based Strategic Design

- 1) Recognize that planners plan, and designers solve problems
- 2) Use constraints to encourage creativity
- 3) Determine constituents needs, which may not be what they say they need
- 4) Engage in prototyping
- 5) Resource the early adopters, and let consensus follow later
- 6) Don't try to do everything

Developing your Enrollment Planning Process Building the "All Hands on Deck" Prototype Plan



Design Thinking: An Overview



- Mindsets in engaging human problems
- Creative Problem-Solving Process, Process Skills and Methods
- Communication Design for Collaborative Innovation
- Master of Design Graduate Certificate of Design Thinking

" By approaching design as a form of thinking in collaborative problem-solving, we can make a more empathetic and inclusive society."

Youngbok Hong, director of visual communication design programs, professor

Developing your Enrollment Plan

The Power of the ASO Planning Model

The Analyze/Strategize/Operationalize strategic planning model (or ASO Planning Model) serves as a framework for facilitating high impact short/mid-term enrollment plans with a heightened level of fidelity. Successfully applied on the IUPUI campus during the 2021-2022 academic year, this model has been in development the last 4 years, and minted through integrating the IUPUI Graduate Program in Design Thinking framework into the work (housed in the Herron School of Art and Design). Through a mixed methods holistic data analysis process that integrates real-time qualitative data from both customer and workforce mindsets, an optimized approach to capturing the most accurate directionality in defining high impact practices emerges. This planning framework affords the enrollment designer a level of precision in determining external and internal shaping focus, to thus focus efforts in alignment with the workforce dependent upon fulfilling efforts. This parts from traditional strategic planning, and enters the realm of enrollment design by employing a qualitative coding methodology from the insights of the employee base. The new outputs are then connected to the traditional sources of both quantitative and qualitative outputs, thus providing a new depth in decision making power for leadership. The result: your highest impact enrollment practices always, and a professional context that breeds empowerment and success for your workforce.

ASO Planning Framework

A Journey Towards Enrollment Optimization



Analyze

Strategize



Operationalize

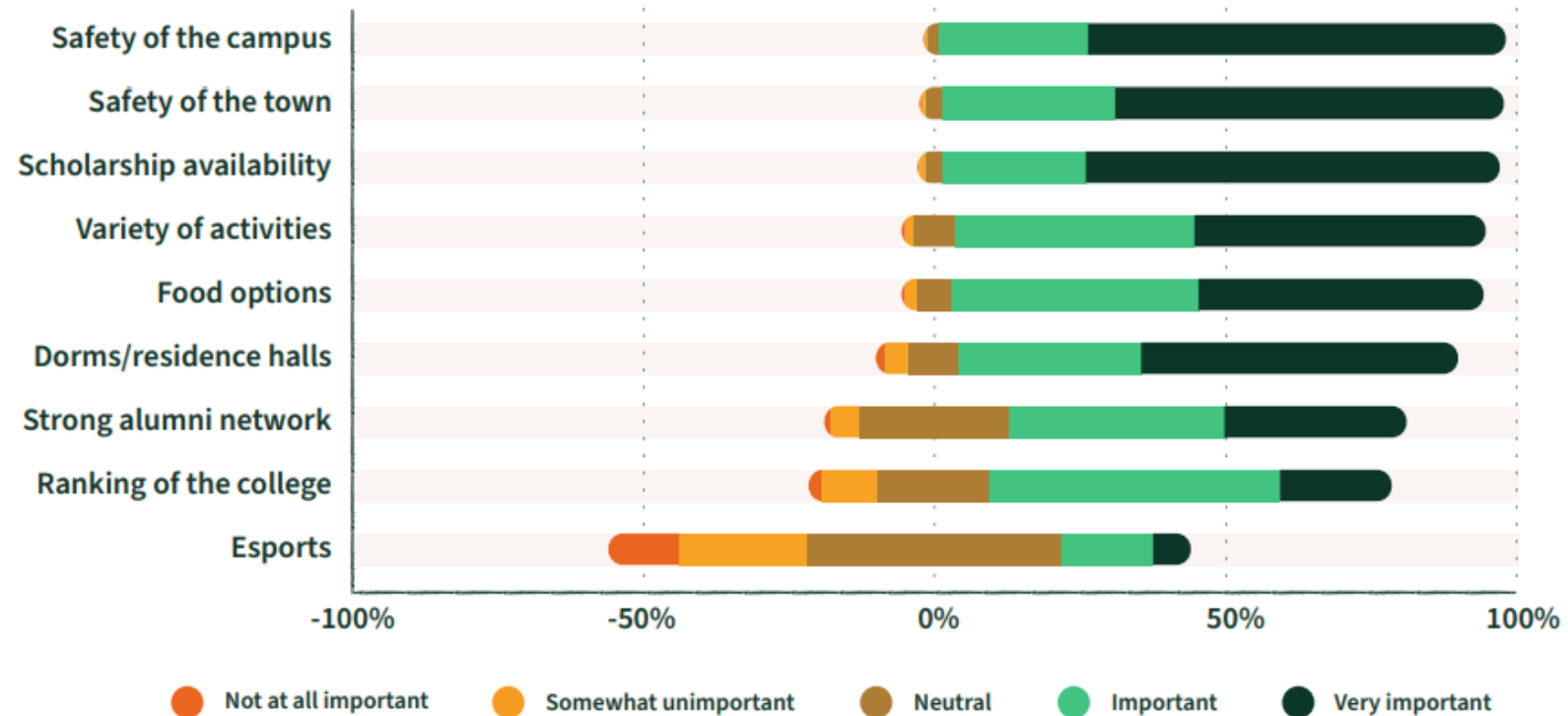


ASO Planning Model: **Analyze**



Analyze: National Data Sets

Preferred Campus Features



Analyze: Institutional Data Sets

2022 Entering Student Survey

DECISIONS TO ATTEND IUPUI

In making a decision to choose IUPUI or transfer to IUPUI from another institution, please rate how important the following factors were:

	N	Mean	Not Important	Somewhat Important	Moderately Important Percentages	Very Important	Extremely Important
Availability of financial aid/scholarship	652	4.30	2.3	3.4	10.6	29.9	53.8
Academic quality	761	4.29	0.8	1.6	12.1	38.9	46.6
Availability of specific academic programs (majors)	763	4.20	1.3	3.5	14.2	35.9	45.1
Graduates get good jobs	763	4.17	1.2	2.8	14.0	41.8	40.2
Affordability	764	4.09	1.8	3.9	17.4	37.1	39.6
Job, career, and internship opportunities available in Indianapolis while attending school.	765	4.04	2.2	5.5	17.0	36.5	38.8
Focus on hands-on experiential learning (e.g., internships, service learning, and research projects)	764	4.01	2.0	5.4	19.2	36.6	36.8
Career and job opportunities available in Indianapolis after I complete my degree	764	4.01	3.7	7.2	17.5	27.6	44.0
Welcoming campus	764	3.81	2.5	7.5	24.6	37.6	27.9
Feeling that I "fit in" at IUPUI	764	3.78	3.7	8.1	25.0	33.1	30.1
Opportunity for an IU or Purdue Degree	652	3.76	5.7	8.3	22.9	30.7	32.5
Campus emphasis on student health and wellness	762	3.74	3.7	7.5	26.8	35.4	26.6
Emphasis on health or healthcare in academic programs	762	3.66	4.9	9.4	27.0	32.0	26.6
Focus on diversity	650	3.64	6.6	8.3	26.0	32.9	26.2
Personal attention from faculty	651	3.61	3.4	9.2	29.5	39.3	18.6
IUPUI's reputation	651	3.59	4.5	8.9	29.8	37.3	19.5
Resources available for underserved students (LGBTQ, students with disabilities, students of color, veterans, older students, transfer students, etc.)	651	3.50	10.8	11.2	23.0	27.6	27.3
A visit to campus	650	3.44	7.8	12.0	27.8	32.9	19.4
Social activities and campus life opportunities at IUPUI	763	3.40	4.0	9.5	27.5	35.2	23.8
Social opportunities associated with IUPUI located in city of Indianapolis	763	3.40	6.2	13.9	31.6	30.5	17.8
Type of housing available on campus	651	3.36	16.1	10.9	19.4	28.0	25.7
Small class size	652	3.13	9.7	14.0	41.3	23.6	11.5

1= Not Important, 2=Somewhat Important, 3=Moderately Important, 4=Very Important, 5=Extremely Important
Rank ordered by means

Analyze: Funnel Data/ Prospective Student

Admissions Funnel – responsibility of the admissions unit



ASO Planning Model: **Strategize**

- Designing through sensemaking and ideation:
The Workforce Output X-Factor
- Roundtable discussions: faculty and staff: what problems can we solve?
- Data interpretation through subjective user experience (UX) outputs
- Qualitative methods: coding into themes, determine constituent needs
- Middle management finalization of "problem themes"
- Executive leadership approval of alignment with mission



ASO Planning Model: **Strategize**

Capabilities Assessment
(Internal and External)

- 1) **Viability**
- (can it be sustained long-term?),
- 2) **Feasibility** (do we have the capacity, tools and know-how to do it?) and
- 3) **Desirability** (does it fit our mission and can we embrace it as an institution?)

Makes it easier to link strategic design
to resource allocation



ASO Planning Model: Operationalize

- Centralize enrollment effort
- Vertical and horizontal alignment
- Define the “low hanging fruit” that can earn us some quick wins?
- Timeline how we will share out progress
- Establish structure for ongoing audit of plan



New Student Beginner Enrollment: IUPUI Traditional Enrollment Management Strategic Planning

Enrollment Outcome of 2020 Cycle

Enrollment Outcome of 2021 Cycle

-17.5%



-5%

**New Student Beginner
Enrollment: IUPUI
Enrollment Design Prototype
Year**

Enrollment Outcome of 2022 Cycle

+ 1%



Case Study: Designing a Short-Mid Term Plan for Enrollment Success at IUPUI



Transitioning from Planning to Designing

Design Thinking Process for Content-first Design



Discovery

Understand
business goals,
user needs, and
problem space



Content Strategy

Create a
strategy (plan)
for the content



Prototype

Write and revise
web copy; create
wireframes



User Test

Test and
improve

Analyze: What Do We Know?

Colin Powell's 40-70 Rule

- You need between 40% and 70% of total information to make a decision
- With less than 40%, you will likely make a poor choice
- With more than 70%, you will end up taking too long, and the decision will be made for you.



Analyze: What Do We Know?

- ◆ Data Canvassing and Individual Evaluation
 - Partner with Assessment and Learning Professionals
 - Collect quantitative and qualitative data from across various sources
 - Make data accessible to all enrollment stakeholders for review, with instruction to engage in roundtable discussion with an output deliverable.



Strategize: Where Will We Focus Efforts?

- ◆ Ideation Roundtable: Decentralized, inclusive of faculty and staff enrollment stakeholders. Over 200.
- ◆ All ideas are welcome, and submitted in the form of an executive summary
- ◆ Over 350 lines of submitted data across campus
- ◆ Data is coded, and translated into themes
- ◆ Themes treated as ethnographic insights, and recombined with original data set.
- ◆ Final evaluation in combinations with original data by data analysts and industry insight team
- ◆ Priority recommended recruitment populations finalized for campus leadership input.
- ◆ Emergent strategy themes finalized for campus leadership input



Operationalize: How will we get this done?

- ◆ Roundtable groups receive north star and themes and design: define work activities under each strategy theme area
- ◆ Manager receives and budget and each activity to a expense line, and submits the budget.
- ◆ Industry insight team performs initial capabilities assessment to produce three budget scenarios (thrive, standard, within budget)
- ◆ Final cycle plan is shared with cabinet leadership, for capabilities assessment across all university funded areas.
- ◆ Final approval.



Operationalize: How will we get this done?

- ◆ Establish an ongoing space for evaluating the existing plan, for intervention decisions
- ◆ Connect stakeholders to spaces for updates (in person and virtual)
- ◆ Ensure a consistency of message around plan both vertically and horizontally in your organization
- ◆ Timeline the execution process
- ◆ Trust the design



Operationalize: How will we get this done?

Insert: ongoing audit of design plan

16-Feb	Deans and Cabinet: Yield Targets
17-Feb	Undergraduate Recruitment Council: Orientation
3-Mar	Undergraduate Recruitment Council: Housing
23-Mar	Deans and Cabinet Council: Yield Activity Update
24-Mar	Undergraduate Recruitment Council: Student Financial Assistance/Affordability
20-Apr	Deans and Cabinet Council: Summer Melt Minimization Plan Update
25-Apr	Undergraduate Recruitment Council: Academic Advising and Orientation
5-May	Undergraduate Recruitment Council: Post May 1 Class Evaluation/ Summer Yield Collab
18-May	Deans and Cabinet Council : Evaluation of Class
Summer 22	2023 Cycle Strategy Planning: Campus Wide Engagement (Summer Planning)

Results

External

1. Established more precision in data informed decision making around the recruitment experience (**efficiency**)
2. Increased analysis depth in decision making (**impact**)

Internal

1. Established "buy in" to recursive cycles of prototyping, learning and improvement in relation to planning (**perpetual planning**)
2. Inspired a more engaged workforce, with meaningful collaboration across faculty and staff lines (**organizational health**)



Results: The Workforce Insights Integration "X-Factor"

< Sent

Thank you!



As I sit here with many thoughts swirling from today's Enrollment Summit, I wanted to drop you both a note thanking you for your ongoing leadership of our undergraduate recruitment and yield activities across campus.

Although I could say great things about many parts of your leadership, I wanted to specifically acknowledge all the efforts you have put into gathering and implementing feedback from campus partners (including myself). It has been so refreshing to see that feedback acted on as this next recruitment cycle kicks off – in ways such as making planned communications more available, sharing details about recruitment travel, communicating timelines and deadlines well in advance, etc. Rarely have I seen such feedback so thoughtfully and thoroughly addressed. I know the efforts to implement that feedback are not insignificant. I am grateful for the leadership you both provide and for your teams' efforts to not just do great work, but make it a good process along the way for everyone involved. This speaks volumes about the value you place on partnership and collaboration.

Your approach to getting a highly decentralized campus moving in one direction is one I continue to look to as a stellar example of leadership, and I often consider your model when trying to create similar momentum in other areas of the retention sphere.

Next Steps

1. Ensure that vertical and horizontal buy into ongoing prototyping is maintained
2. Consider scaling the model up, to ensure that university leadership receive standardized outputs from across all resourced areas to make a decision
3. Resource your enrollment insights team to be able to keep up to date with industry trends to serve as a filter for final decision point by university leadership
4. Acknowledge the precision that comes with a mixed method analysis, in defining nuances within the strategy build to your stakeholder base

Q & A



Errol Wint

Principal Consultant: 2021-2022
"All Hands on Deck" Spring Yield
Planning" for IUPUI

Director of Undergraduate Admissions,
IUPUI



Professor Youngbok Hong

Director of Master of Design (M.Des)
Herron School of Art and Design, IUPUI