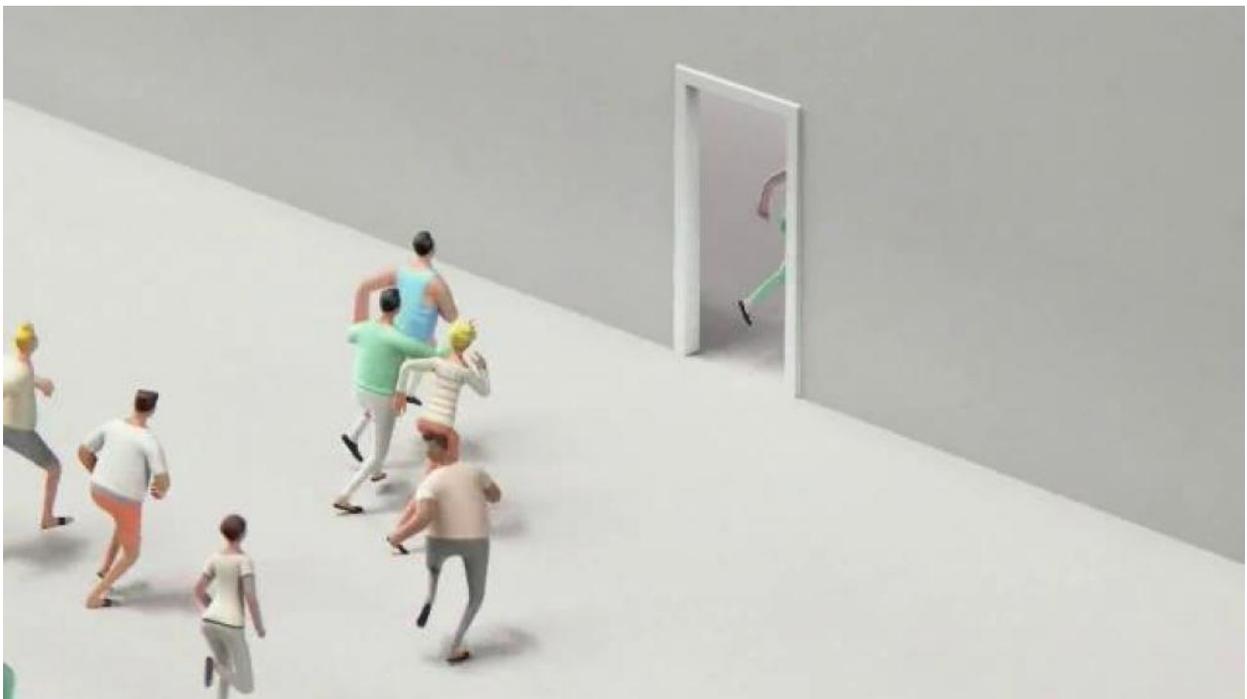


Recommendations and Guidelines for SEM Planning at Montana Western

Widening the Door for Strategic Enrollment
Management and Completion Opportunities for
Students



Next Steps and Recommendation for SEM/C

- Work through the worksheets in this packet adapted from *A Practical Guide to Strategic Enrollment Management Planning*
- Potentially seek a consultant to help with SWOT analysis of enrollment concerns, initiatives, and ideas. The initial SEM workgroup recommend using a consultant from outside of Western to provide neutrality and allow various constituents to feel free to speak into the process.
- Establish what types of ideas and plans are forwarded to the SEM Committee for consideration or implementation (i.e. OCHE mandates effecting enrollment)

Supporting Articles for Further Information

Noel-Levitz Executive Briefing: Six Essential-and Six Common Mistakes- in Cabinet Level Strategic Enrollment Planning

PACRAO presentation paper by Janet Ward: Enrollment Management: Key Elements for Building and Implementing an Enrollment Plan by Janet Ward presented at the Pacific Association of College Registrars and Admission Officer Meeting

Strategic Enrollment Management Quarterly Article by Stanley E. Henderson: SEM and the Student Journey: The Role of Strategic Enrollment Management in Student Engagement

Worksheet 1: University Buy-In: Does the University agree and support the concept of SEM/C and realize what it can do for the campus?

Instructions: Check each activity as it is initiated or completed

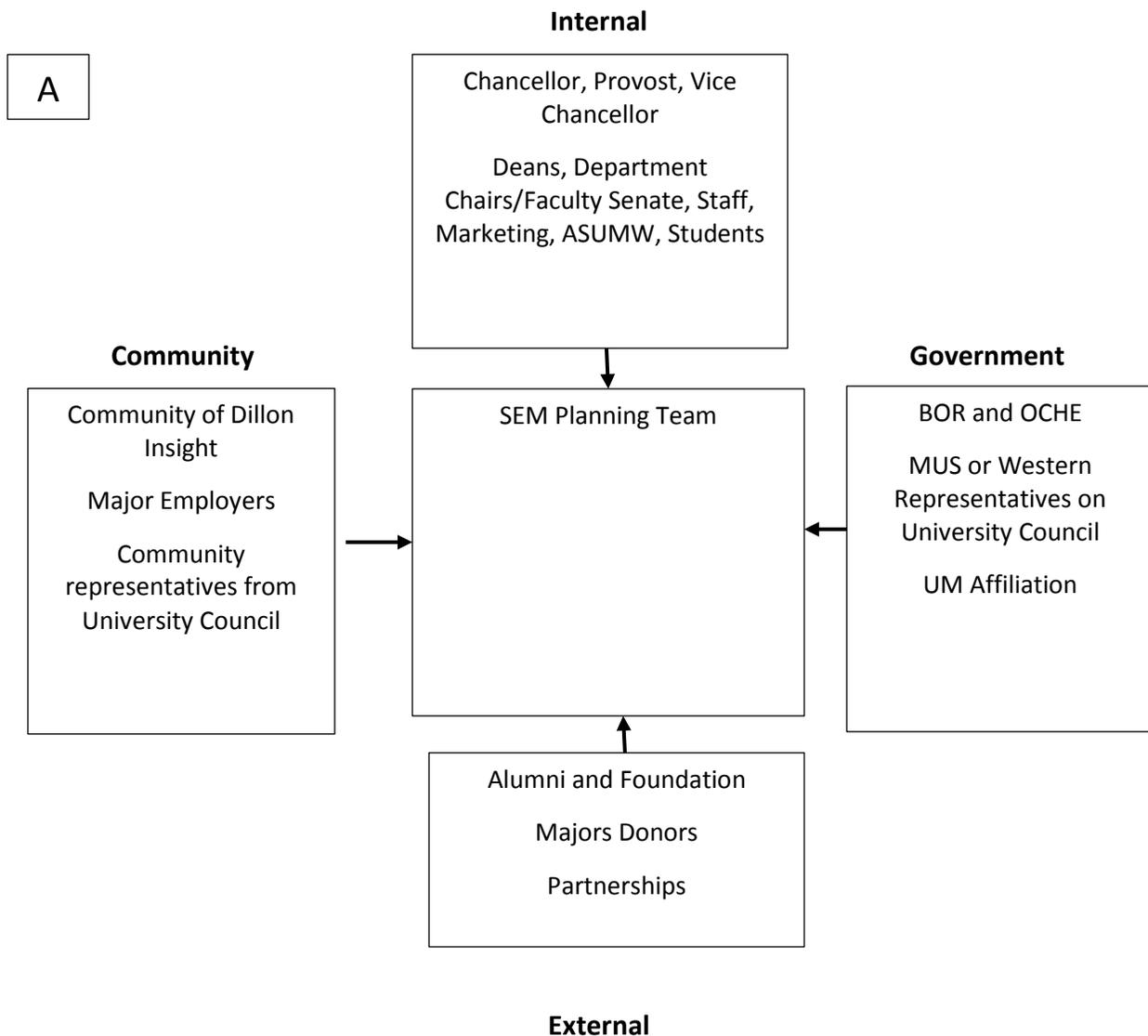
How is University buy-in/support gained in each of these groups? This checklist will be a growing process integrated into the adoption/creation of a SEM plan.

Done	Activity
<input checked="" type="checkbox"/>	Initial information seeking Task Group is Formed
<input type="checkbox"/>	Task Group Shares recommended next steps with Senior Administrative Cabinet
<input type="checkbox"/>	Task Group Share recommended next steps with AAC and other constituents Senior Administration or AAC may designate.
<input type="checkbox"/>	Chancellor and Senior Administration openly promote and support SEM plan
<input type="checkbox"/>	Department Directors, Chairs, and Faculty Senate openly promote and support SEM plan
<input type="checkbox"/>	All other staff and faculty openly promote and support SEM plan and processes
<input type="checkbox"/>	Form the SEM/C Committee
<input type="checkbox"/>	Integration with Strategic Plan/Committee and Communication Structure is established
<input type="checkbox"/>	SEM/C Committee shares initial model with entire campus
<input type="checkbox"/>	SEM Plan refined and approved based on feedback
<input type="checkbox"/>	Resources are committed to the planning process
<input type="checkbox"/>	Implementation Timeframe Established

Worksheet 2 Part A: Understanding who are the constituents group that effect SEM/C? How are they involved in developing a SEM Plan?

Instructions: Utilizing the graphic below brainstorm to identify all constituents groups. Once all constituents groups have been identified, list those which need to be involved in the planning and how they need to be involved.

This can be a guided discussion amongst AAC and/or other small representative groups of the campus (e.g., senior administration, faculty senate). Important items to consider is who/what influences our enrollment, retention, and completion. How are they involved in the student experience? This process feeds into buy-in and commitment to SEM and it is the point where the institution gets its first input.



Worksheet 3: Timeframe for SEM/C Plan Implementation (SEM Committee)

Instruction: From the constituents now committed to the SEM Committee develop a list of what they need to complete to write a plan and the ideal time of completion.

The information listed below does not represent a complete timeframe or plan for ideas but instead some initial ideas of steps to help develop the plan implementation. To quote the Practical Guide "If the SEM/C Committee cannot set goals and timeframes for itself, it cannot possibly develop a SEM plan for an entire institution." This worksheet provides the tool for team development and implementation.

Planning Step	Planning Strategies	Timeframe	Person(s) Responsible
Data gathered to provide baselines as well as provide insight into potential enrollment goals	Data provides the foundation for setting basic enrollment and completion goals		
Gather information about enrollment initiatives already existing on the campus			
Are there any budget implications associated with startup of this plan, not necessarily the goals of the plan			
Develop information regarding formal and information expectation and/or enrollment limitations			
Establish how SEM connects and uses the mission statement and core values to develop objectives and guidelines			
Conduct SWOT Analysis regarding the student experience practices			

Worksheet 4: Resources for SEM/C Plan (SEM Committee)

Instructions: Using the broad categories listed below; use the worksheet to build a budget for the planning process.

What resources are going to be needed to establish a SEM/C Plan? Not necessarily goals and objectives, but actual financial implication of the committee and/or startup of the plan. This is a good opportunity to ask "How will the plan be managed year to year"

Category	Funding Allocation	Personnel Allocation	Office/Person(s) Responsible	Justification
Operating Expenses				
Clerical Support				
Resource Materials				
Release Time				
Consultants				
Other Expenses				

Worksheet 5: Formal Requirement (SEM Committee)

Instructions: identify the laws, policies, and procedures that effect enrollment

The purpose of determining formal requirements is to be aware of mandates that must be met in the enrollment processes. For instance, Montana Western’s associate program is considered open admission. Think about what the University has to do or cannot do based on governance, federal, state laws. What does it have to do to participate in financial aid programs? Other government funding? Are there any community requirements that limit enrollment?

Mandate	Source	Category	Summary	Impact
Open Admission to Associate Program				
Title IX training				Title IV Funding
HEA Compliance Requirements				Title IV Funding

Worksheet 8: Strengths and Weaknesses (Consultant)

Instructions: Use a large flip chart to record all responses to address the following questions. Then utilizing the table below develop broad categories for all the responses and list the specific weaknesses under the appropriate categories.

Weaknesses:

Given everything you know about our organization, what are the major weaknesses related to students moving from prospective to alumni, including both their co-curricular and academic experiences?

Strengths:

Given everything you know about our organization, what are the major strengths related to students moving from prospective to alumni, including both their co-curricular and academic experiences?

Strengths	Weaknesses

Worksheet 9: Opportunities and Threats (Consultant)

Instructions: Utilizing a large flip chart record all responses to the following question. Then use the categories from the table and categorize all input accordingly. While categorizing choose rather it is an opportunity or threat.

Trends:

Given all that we know about our external environment, what are the major enduring and long term trends that will impact the institution over the next 5-10 years?

Potential Events:

Given all that we know about our external environment, what are the potential short term events which might impact the institution over the next 5-10 years?

Category	Opportunities	Threats
Social/Cultural		
Technological		
Economic		
Environmental		
Political		
Postsecondary		

Worksheet 10: Develop Strategic Goals (SEM Committee)

Instructions: Using a large flip chart, record the responses to the following question. Following the group consensus approach, put similar initiatives together and develop major identifiers for each grouping. Within each grouping, refine the suggested goals into action statements which begin with “The institution will” and record each in the first column of the table. Then using the table, start at the top and assign an individual to be responsible for developing the operational plan to achieve the goal and also establish the timeframe for developing the plan.

Question:

Based upon the identified institutional beliefs and core values, and drawing from the SWOT analysis, what major initiatives must we undertake in order to serve the mission and achieve the vision?

Strategic Goal	Timeframe for developing the plan	Person(s) Responsible
i.e. The <i>institution will increase new student enrollment by ___% in each of the coming fall semesters.</i>	1 month	Matt Allen, Director of Admission

