I Can See for Miles and Miles: The Why and How of Environmental Scanning

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Introductions

1. Tom Green, Ph.D., Managing Consultant, AACRAO
   • VP or Dean of Enrollment Management areas for 23 years
   • Small/private/remote to large/urban/public institutions
   • SEM planning, financial aid analysis, communication strategies expertise

2. Christine Kerlin, Ed.D., Senior Consultant, AACRAO
   • Retired as Vice President for Strategic Planning and the University Center, Everett Community College after 33+ years in higher education administration
Overview

1. How does environmental scanning fit within SEM?
2. Why conduct environmental scanning?
3. What type of data and information is collected?
4. By whom?
5. What is this used for and how?
6. Discussion
SEM Process Framework

Process steps

- Align institutional strategic plan with broad enrollment targets and desired mix of students
- Data and information gathering and assessment: Internal culture/environment, student enrollment behaviors and scan of external environment
- Use data and information results to establish focused goals each for recruitment, retention, service, etc., and enrollment projection models
- Approve strategic goals and enrollment projection models
- Develop action steps, accountability, and metrics
- Implement action steps
- Monitor progress, Report results to campus and executive leadership

Performed by

- Executive leadership, SEM Steering Committee
- Data Team: a smaller group of staff and faculty adept at economics and data use
- Goals recommended by SEM Recruitment and Retention Councils; models developed by Data Team
- Executive leadership, SEM Steering Committee
- SEM councils and sub-committees
- Appropriate staff and faculty departments
- SEM Steering Committee, Chief Enrollment Officer

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SEM Planning Framework

- Sustainable Enrollment Outcomes
  - Tactics
  - Strategies
  - Enrollment Infrastructure
  - Strategic Enrollment Goals
  - Data Collection and Analysis
  - Key Enrollment Indicators
  - Institutional Strategic Plan

Bontrager/Green

AACRAO SEM XXIII - 2013
Why conduct environmental scanning?

1. Environmental Scanning:
   • Detects scientific, technical, economic, social, and political trends and events important to our institution.
   • Defines the potential threats, opportunities, or changes for our institution implied by those trends and events.
   • Promotes a future orientation in the thinking of management and staff.
   • Alerts leaders and staff to trends that are converging, diverging, speeding up, slowing down, or interacting.
   • Enables decision-makers to understand current and potential changes taking place in our institutions' internal and external environments.

http://horizon.unc.edu/courses/papers/enviroscan/default.html
Why conduct environmental scanning?

2. Environmental Scanning:
   - Provides information everyone can see. It levels the playing field.
   - Verifies/contradicts/expands anecdotes and fables.
   - Tests assumptions about future enrollment growth, improvement, etc., against trends in your particular market or area and benchmarks retention/progression/completion data against other institutions of your type:
     - This helps institutions set reasonable goals that challenge enrollment potential but based upon metrics.
   - Sets a standard that SEM decision-making will be informed by data and information.
What type of information is gathered?

External

1. Income and Expense (tuition, program costs) benchmarks:
   • Where do your costs fit within the costs in your market/area?

2. Peers and Competitors:
   • Application, National Student Clearinghouse, ACT/College Board data

3. Trends:
   • Demographics
   • Employment trends by programs or areas, demand for labor
   • Technology
   • International

4. Higher Ed trends:
   • Changes in high school graduation rates
   • Changes in delivery systems and preferences

5. Regulations and compliance
What type of information is gathered?
Internal

6. Enrollment trend data for the past five years:
   • Overall size of the institution
   • Demographic trend data (age, ethnicity, geography)
   • Student preparation characteristics
   • Remediation
   • Retention

7. Program profiles:
   • Enrollment, retention, completion, cost, by program

8. Trends in student transfer:
   • In and out
What type of information is gathered?

Internal

9. Business/industry connections

10. Alumni:
    • Placement, licensure rates
    • Overall satisfaction with the experience
    • Rate of alumni participation (giving, volunteerism)

11. Campus and student surveys

12. Facilities plans

13. More. The list is long and is determined by your context
Where is all of this data?

- Some is quantitative, some is qualitative

1. Your ERP or SIS.
2. Surveys
3. Hidden in individual offices of the institution
4. Census
5. Government sources: NCES, DOE, state or province coordinating agencies, warehouses
6. Independent agencies: NCHEMS, WICHE
7. Local, regional and national economic and workforce agencies
8. Higher Ed data: Clearinghouse, Inside Higher Ed, University Business, professional associations, consulting agencies (white papers)
9. K-12 school districts
10. Web searches
11. Education literature
12. Wild card!
How do you get this done?

Hand the whole thing to IR

Create a committee

Reach out to the community

Other?
SEM Organizational Framework

Executive Leadership
Institutional strategic plan, approval and champions of strategic enrollment goals and initiatives

SEM Steering Committee
Long-term enrollment goals, securing the approval of strategies through appropriate institutional channels, communication with Executive Leadership

Recruitment Council
Develop 3-4 strategic goals for new student recruitment; review and approve sub-committee action plans; recommend to SEM Steering Committee

Retention Council
Develop 3-4 strategic goals for retention and graduation; review and approve sub-committee action plans; recommend to SEM Steering Committee

Data Team
Environment scanning, student enrollment behavior research, enrollment models, provide data to councils as needed

3-4 Sub-Committees
Action plans, time lines and metrics for each strategic goal

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When does it get done?

1. Environmental scanning is one of the first steps in strategic planning because it asks the questions: What’s going on? What is on the horizon, or just over the horizon?
   - An environmental scan may help you skate to where the puck is going to be.

2. It should be an iterative process.
Where do you go with this?


2. Analyze and formulate issues. How does this data outline the environmental challenges and opportunities, the institutional strengths and weaknesses?

3. Develop a hierarchy of issues and possible responses.

4. Shape long-range goals and modify what needs to occur to achieve them:
   • While the mission and vision of the institution may drive overall enrollment goals, knowing the opportunities and challenges helps balance the realism of those goals and inform resource levels and time lines required to reach them.

5. Be prepared to dive for more data.
Thank you!

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