



EAB

# Northern State University SEM Planning Kickoff Meeting

# The National Landscape in One Slide



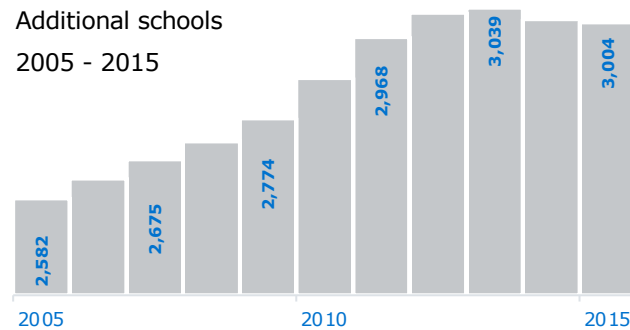
## College Capacity Increased...

Total 4-Year Degree-Granting Institutions

**422**

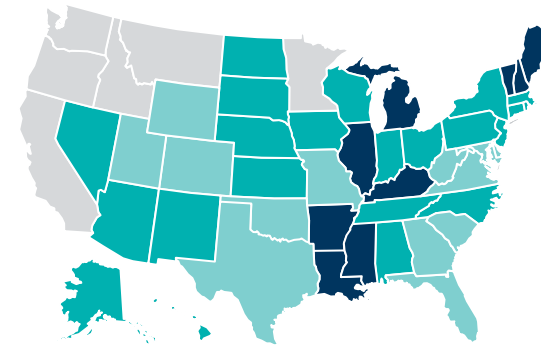
Additional schools

2005 - 2015



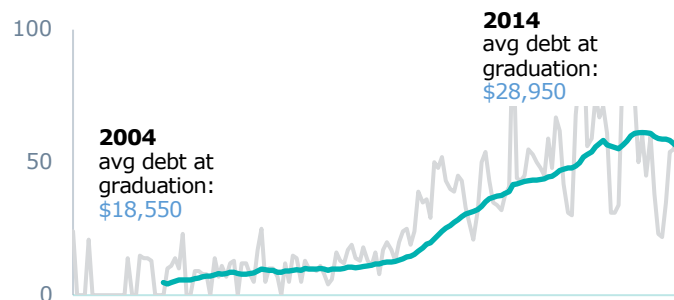
## ...With Far Fewer Students on the Horizon

Projected Change in Students Attending Regional Four-Year Colleges and Universities 2017-2029



## ...Amid Growing Doubt Over Value

Google searches for: "Is College Worth It?"



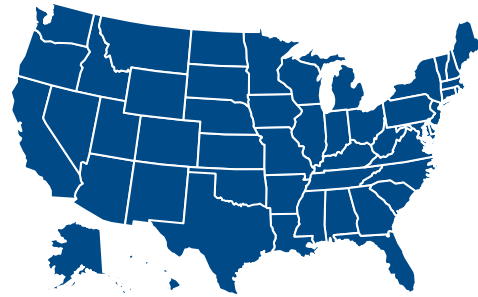
### Regional:

Research universities and liberal arts colleges ranked outside of Top 100 (USNWR rankings)

- 0% to 10% growth
- 1% to -9% decline
- 10% to -19% decline
- over -20% decline

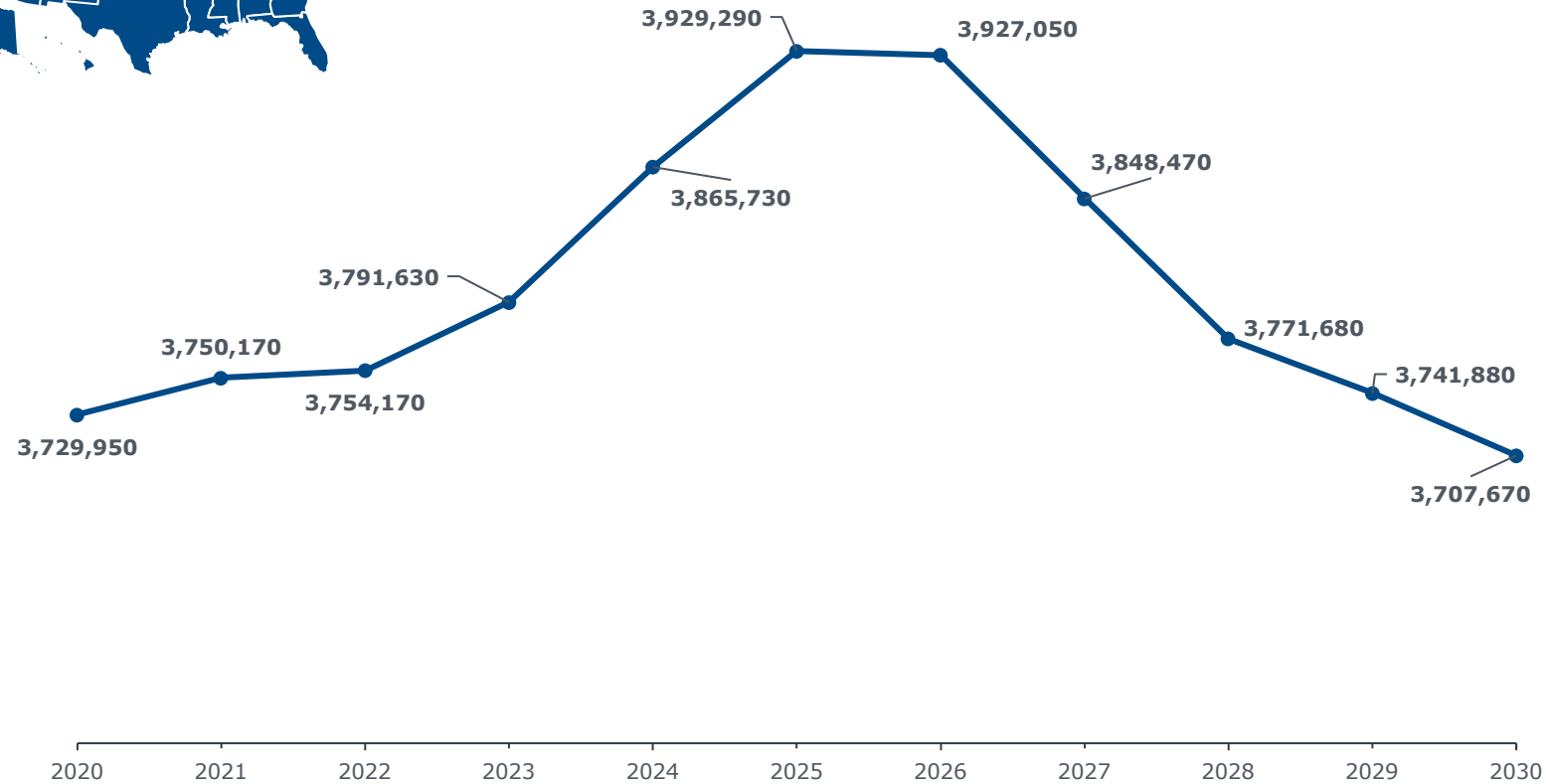
# United States High School Graduate Change

Graduating Classes 2020 – 2030



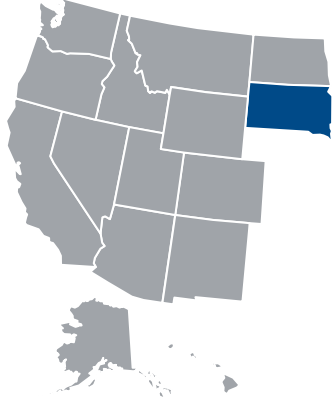
United  
States

-0.6%

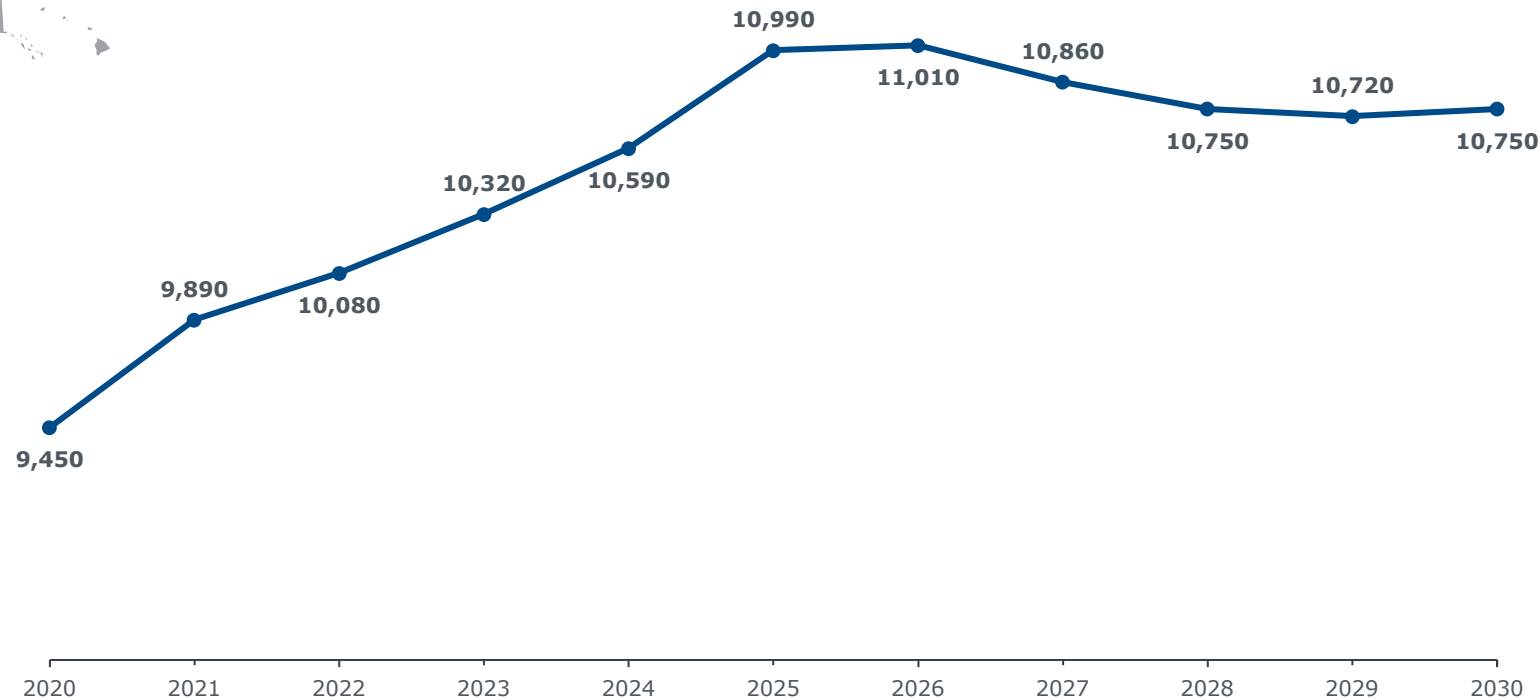


# South Dakota High School Graduate Change

Graduating Classes 2020 – 2030



South Dakota	Western Region
+13.8%	+1.2%



1) Western Region includes: AK, HI, WA, OR, CA, ID, NV, MT, WY, UT, AZ, CO, NM, ND, SD

# South Dakota Demographic Change

## Graduating Classes 2020 – 2030



Ethnicity	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	% Change 2020-2030
American Indian/Alaskan Native	650	620	660	630	640	650	650	630	600	600	580	<b>-10.8%</b>
Asian/Native Hawaiian/Pacific Islander	160	160	160	170	180	180	170	170	170	180	200	<b>25%</b>
Black/African American	230	260	270	270	310	330	330	320	340	350	360	<b>56.5%</b>
Hispanic	410	460	520	700	670	820	840	920	980	970	1,070	<b>161.0%</b>
White/Caucasian	6,820	6,890	7,030	7,210	7,290	7,390	7,340	7,230	7,040	6,930	6,900	<b>1.17%</b>

1) Western Region includes: AK, HI, WA, OR, CA, ID, NV, MT, WY, UT, AZ, CO, NM, ND, SD

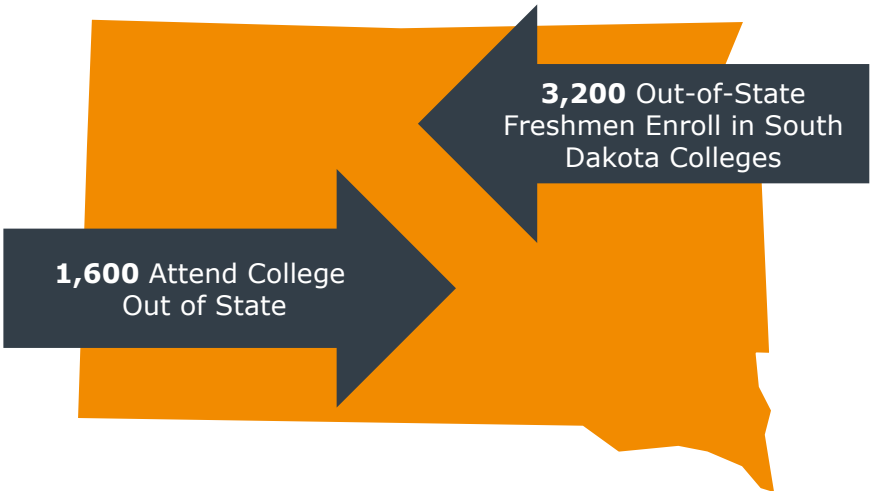
2) Note: Private schools do not report ethnicity and are excluded from these totals

# Keen competition for South Dakota students

**23% of South Dakota Graduates  
Attend Out-of-state**

**7K**

High School  
Graduates



**22 Colleges & Universities**

Institution Type	4-Year	2-Year	Total
Public	7	5	12
Private, NFP	7	0	7
Private, For Profit	3	0	3
<b>Total</b>	<b>17</b>	<b>5</b>	<b>22</b>

Source: Digest of Education Statistics, 2017 Table 309.10

Source: The Chronicle of Higher Education, [2018 Almanac](#)

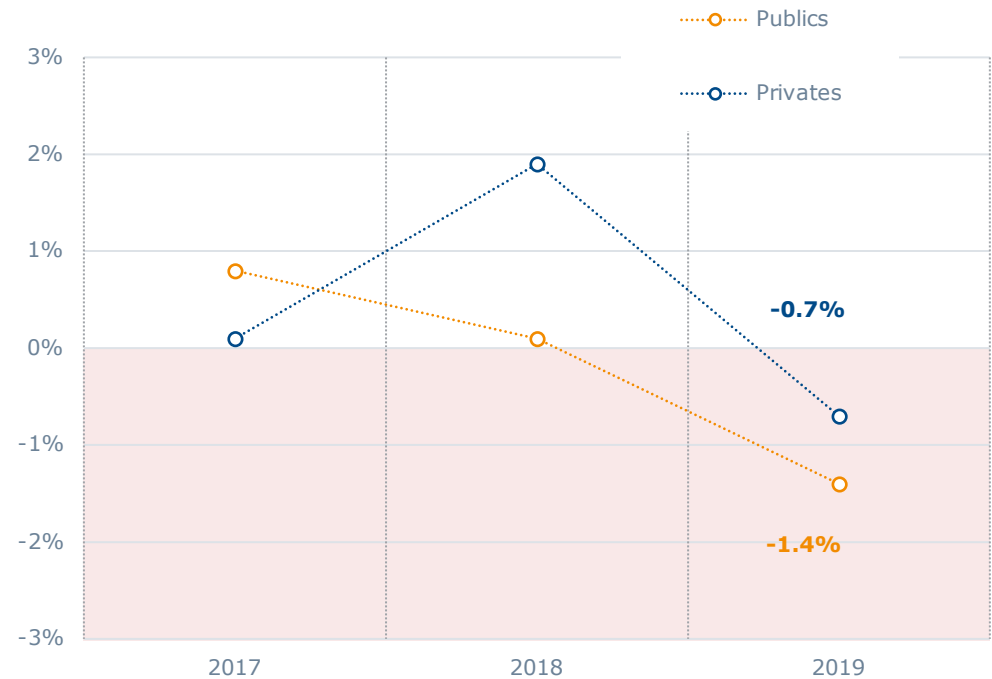


# Troubling Undergraduate Trends

Little Cause for Celebration in Recent Enrollment Cycles

## Percentage Change in Enrollment from Previous Year

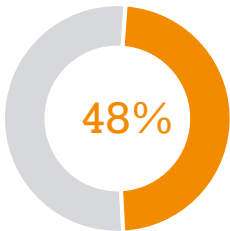
Fall Undergraduate Enrollment  
(Bachelor's-Seeking Undergraduates)



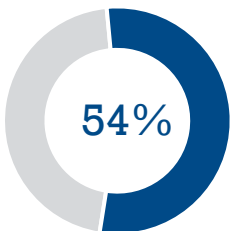
## Percentage of Schools That Met Admissions Goals

Entering Class 2019

Publics (Master's/Bachelor's)



Privates (Doctoral/Master's)



Sources: National Student Clearinghouse Research Center, Fall 2019 Current Term Enrollment Estimates, December 16, 2019; Scott Jaschik, "2019 Survey of Admissions Leaders: The Pressure Grows," *Inside Higher Ed*, September 23, 2019.

# EAB's Data Dive into Enrollment Results

10 Years of Enrollment History, 7,000+ Institutions, and 50 States

## Market Share Has Almost Twice the Impact<sup>1</sup> on Enrollments vs. Demographics

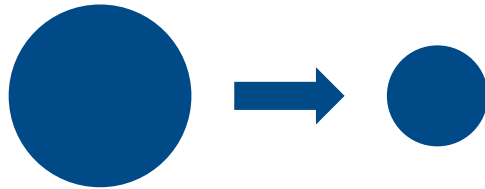
*Estimated Effect on Average<sup>2</sup> Institution's Enrollment Changes 2008 to 2018*

*4-Yr Public and Private, Nonprofit Institutions*

**37%**

### Demographics

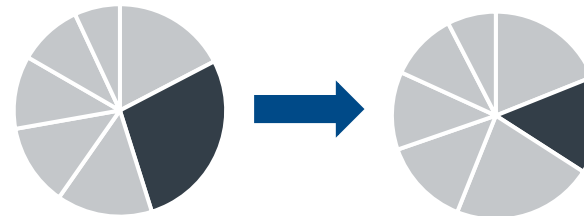
The total number of students



**63%**

### Market Share

Your institution's share of total students



## Increasing Market Share Not Uncommon

*Statistics on Market Share Change (2012-2018) – 4-Year Public and Private, Nonprofit Institutions*

**-24%**

Bottom 10%

**-6%**

Bottom 25%

**+10%**

Median Change

**+28%**

Top 25%

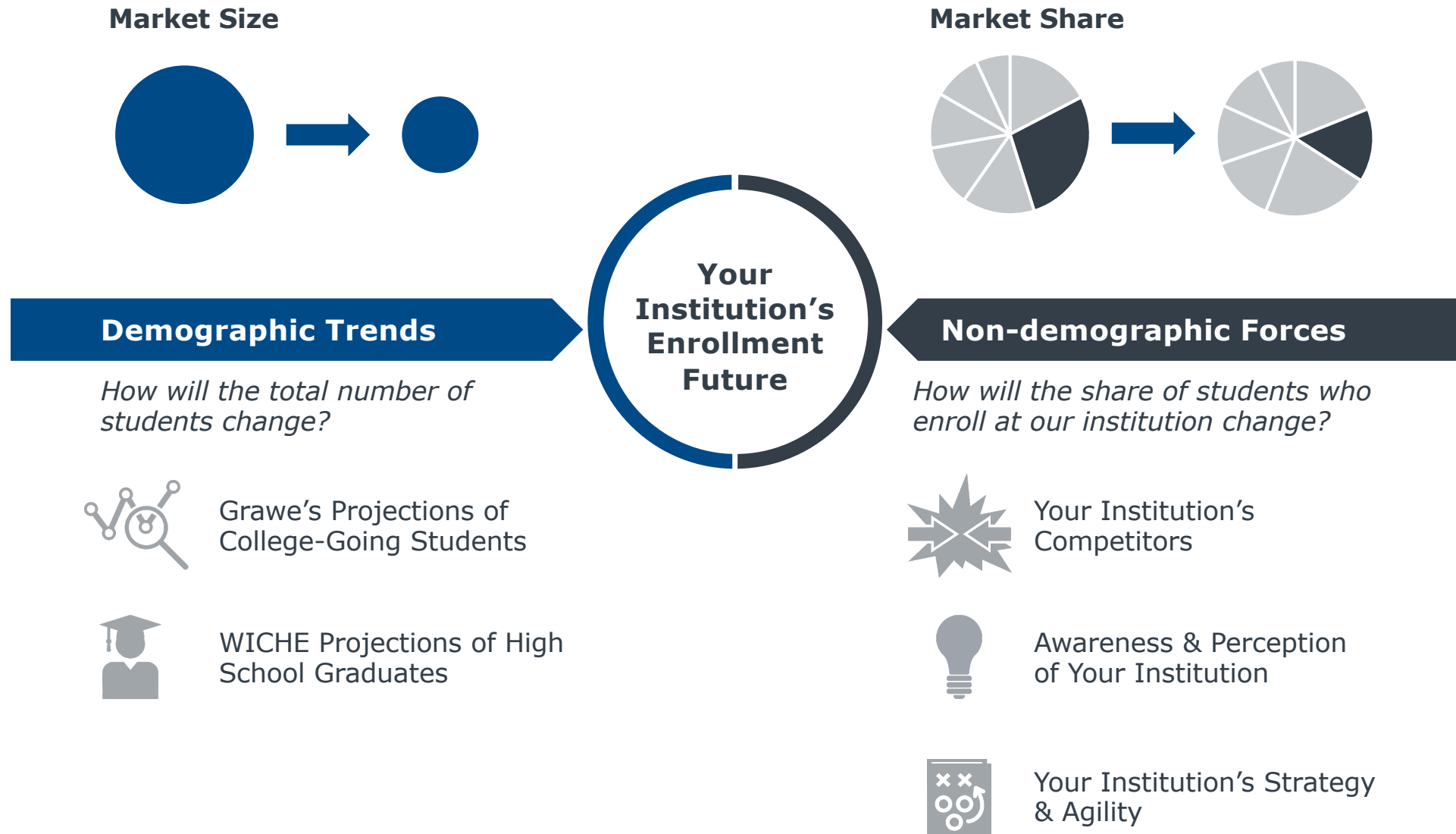
**+50%**

Top 10%

1) Impact calculated as a share of the absolute year-on-year change.  
2) Weighted average of four-year public and private, nonprofit institutions.



# Key Considerations for Each Side of the Equation



## What is a SEM Plan designed to do?



### **Collaborative Process**

Brings institutional stakeholders together to define desired future enrollment and financial trajectory



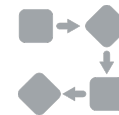
### **Reflect the institutional mission**

SEM Plans reflect the institutional mission and vision and are grounded in demographic reality



### **Drive Strategic Decision-Making**

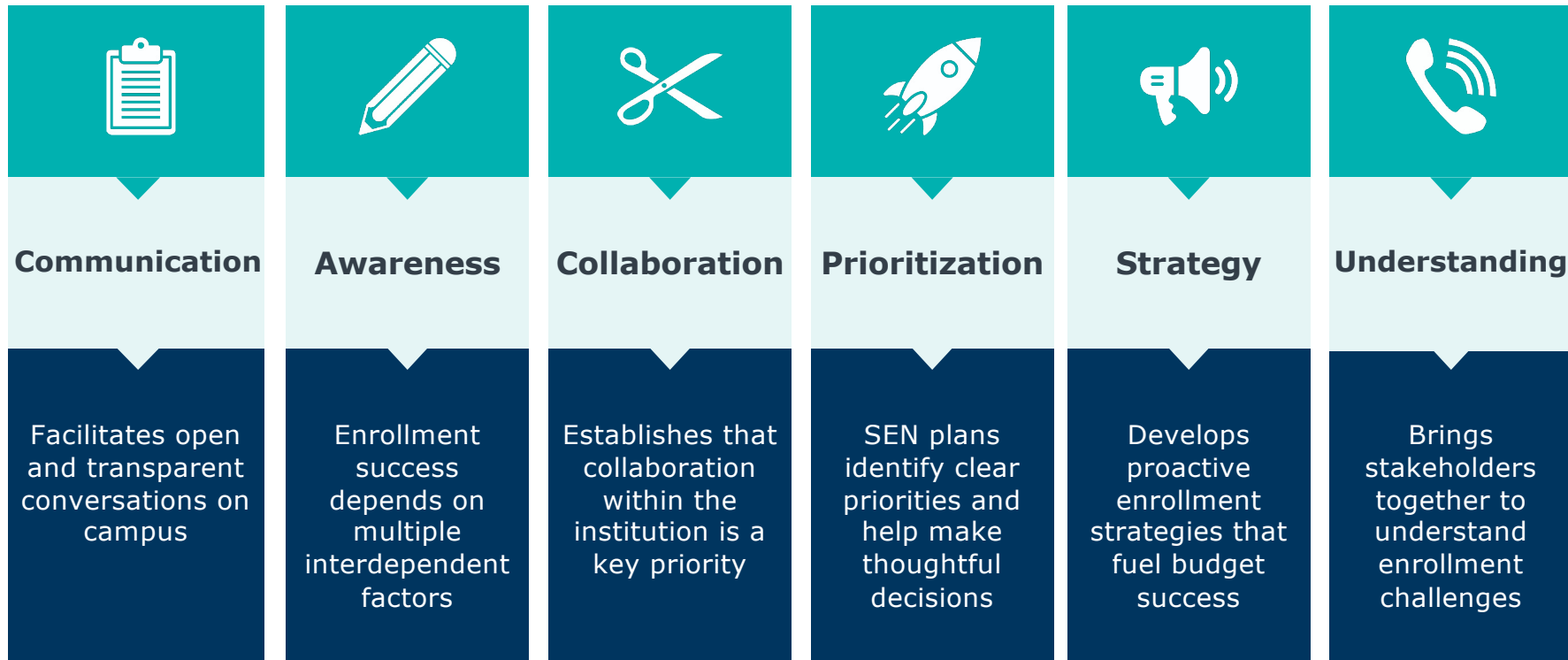
Use research and objective data that aligns internal aspirations with enrollment demand



### **Places enrollment at the center**

Uses an enrollment lens as the fulcrum for campus-wide integrated planning and prioritization

## Why is SEM planning important?



# SEM Planning Components



**SEM planning is not “one size fits all”**



## **Framework for Strategic Enrollment Management**

Recruiting and enrolling students

Organizational capacity

Investment required and funding sources



## **Review of NSU’s Current State**

Enrollment history – recruitment and retention

Challenges and opportunities



## **Enrollment Management Goals**

New student targets and benchmarks

Expected ROI on enrollment investments

# SEM Planning Intended Outcomes



The NSU community unites around a common understanding regarding:

1

## **External market forces**

- Enrollment potential
- Multiple application types

2

## **What students want**

- Academic experience
- Campus life experience

3

## **The need for transparency**

- Open conversations about institutional priorities

4

## **Campus roles**

- The role each person on campus plays to support positive enrollment results

5

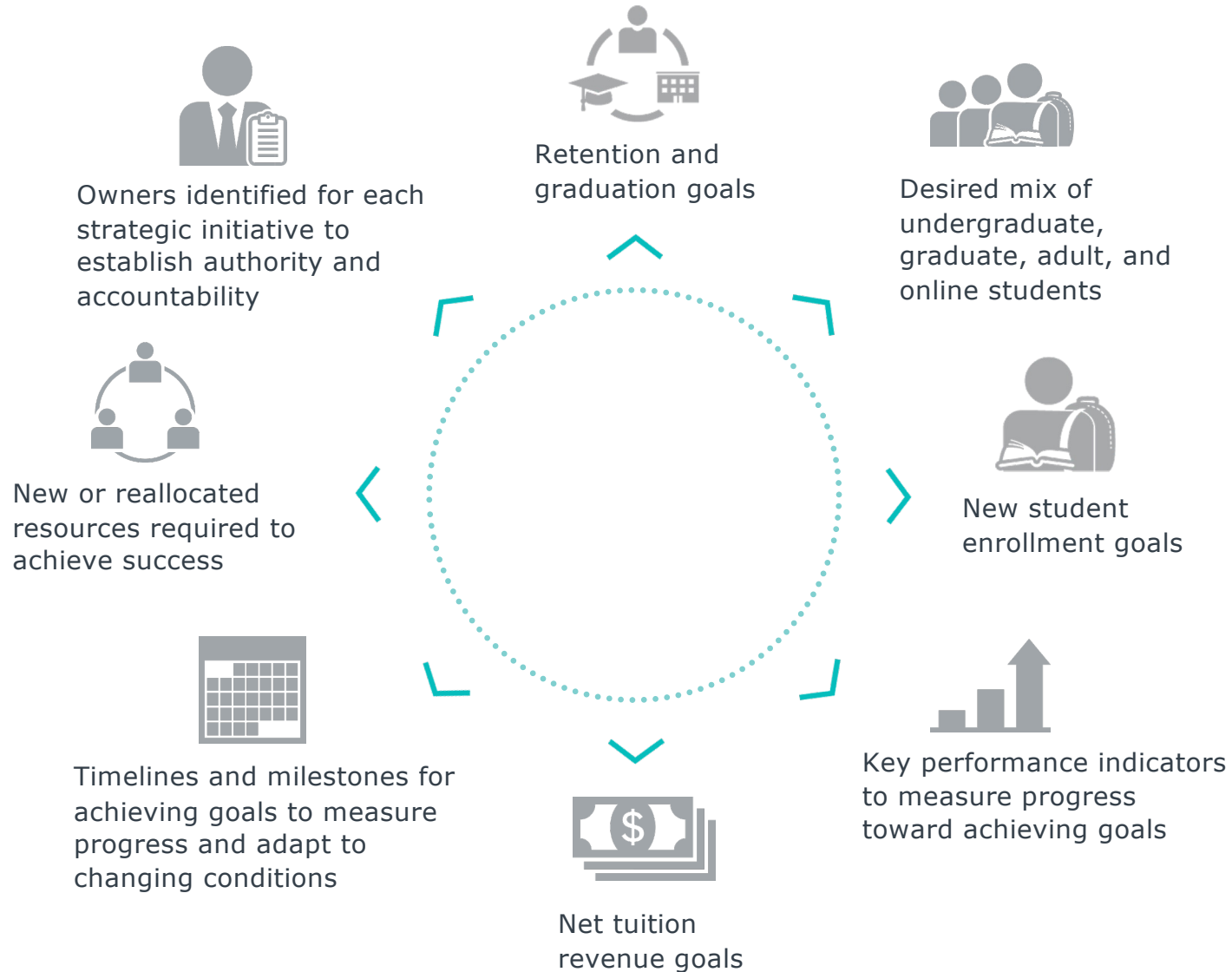
## **The imperative for change**

- Move beyond “business as usual”

6

## **The 3 Cs of SEM Planning**

- Communication, collaboration & cross-Divisional planning



**Set the tone and shepherd the process:**

- ✓ **Define the priorities**
- ✓ **Identify and recruit working group participants**
- ✓ **Establish working group structure and tasks**
- ✓ **Determine level of transparency**
- ✓ **Develop project map and timeline with regular checkpoints**
- ✓ **Review working group draft assessments and recommendations**
- ✓ **Draft final report for endorsement**

## Academic Program Mix and Student Demand



Identify strengths and gaps in the current academic portfolio through the lens of student (undergraduate, graduate and online) and employer market demand.

## Retention



Review current retention results segmented by each key population to benchmark progress against current goals and to identify opportunities for improvement.

Establish new retention goals at the macro and student-segment levels.

Review financial aid as a strategic tool that supports continuing student persistence.

Conduct student lifecycle SWOT analysis to identify current policies and business processes that impede retention.



## Recruiting New Students

Review current recruitment strategies and tactics by student type (undergraduate first-time and transfers; graduate; and online) and create basic return-on-investment calculations.



Are there inefficient current practices where resources may be allocated to other initiatives?

Are there additional best practices not currently pursued due to internal constraints such as staffing or budget?

Review financial aid as a strategic tool to support new enrollments.

Conduct applicant journey SWOT analysis to identify current policies and business processes that are barriers to enrollment and onboarding success.

## Budget and Revenue



Identify five-year net tuition revenue requirements to inform goals for undergraduate, graduate and online enrollments.

Identify funding sources for potential new investments to improve enrollment results.

## Institutional Identity and Brand Assessment



Evaluate Northern State's brand to determine whether it is well-defined in the marketplace and that it resonates with key audiences and stakeholders.

Use qualitative and quantitative data to measure if Northern State is effectively communicating its value proposition to prospective undergraduate, graduate and online students (and parents as appropriate).

Does the lived experience of students match the brand promise?

## Student Engagement that Drives Retention



Define the range of student actions and activities to be tracked

Track student involvement in co-curricular and extracurricular activities

Identify student actions that do and do not drive retention

Develop strategies to improve retention across all student groups

# What Strategies Will Win Over Students and Parents?



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# Strategy Doesn't Function in Silos



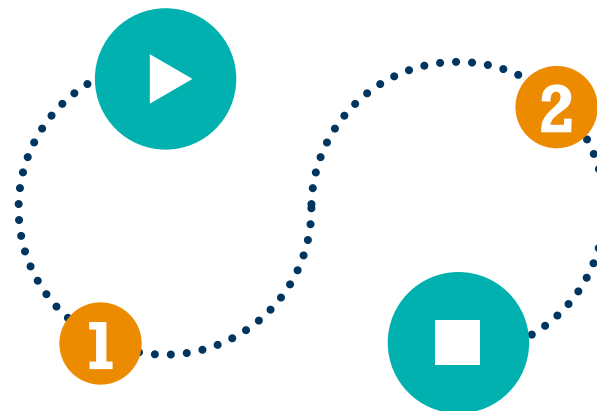
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## SEM Plan Advocates

As working group members, you are champions of change. But, change is hard!

## Forward-moving & Student-centered

There is a sense of urgency here. Doing the same things will not yield different results.



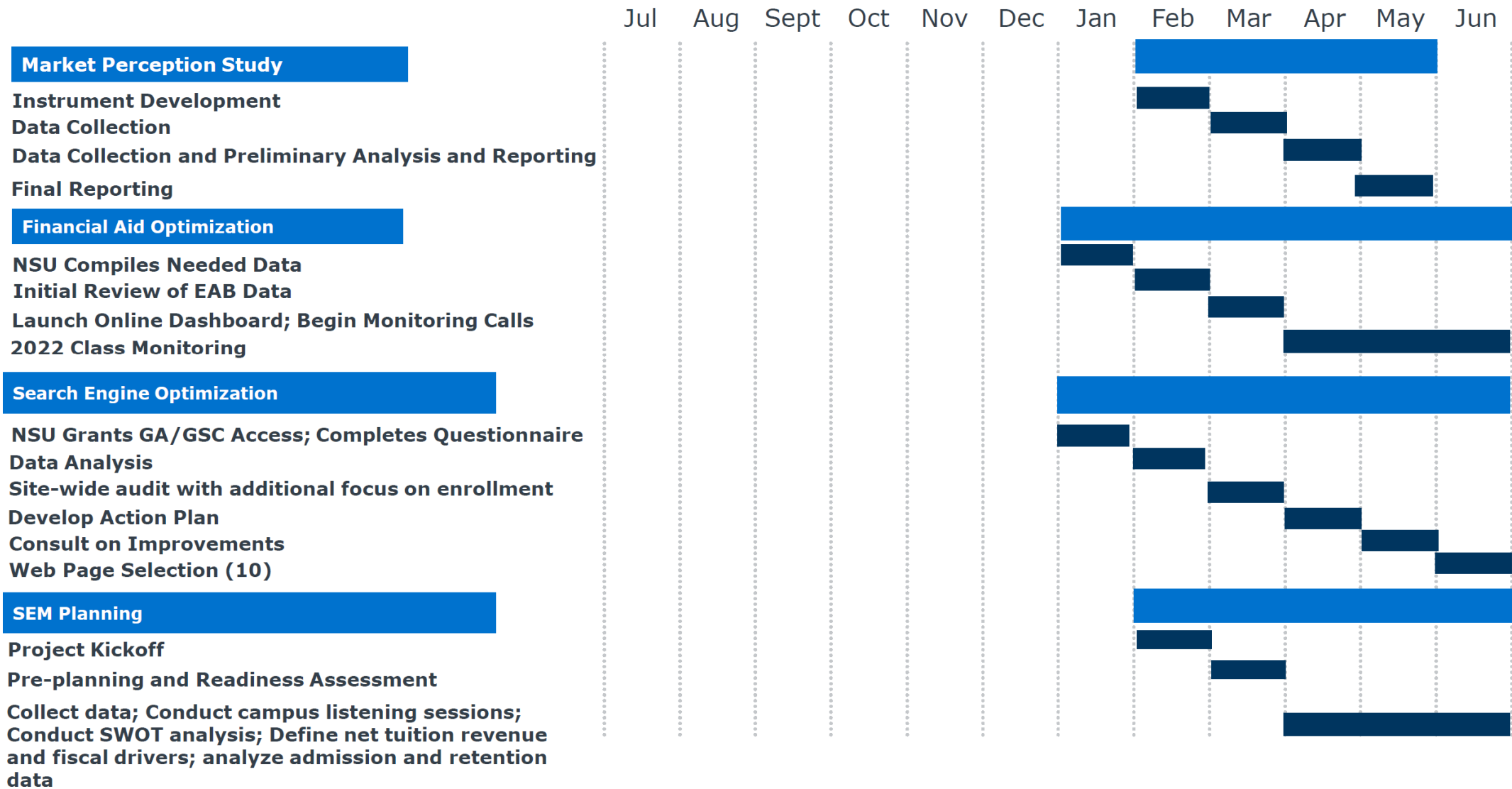
## SEM-Informed Decisions

Check future initiatives and proposals against the SEM plan.

## Continuous Improvement

SEM Plans are not meant to live on a shelf. They are living documents

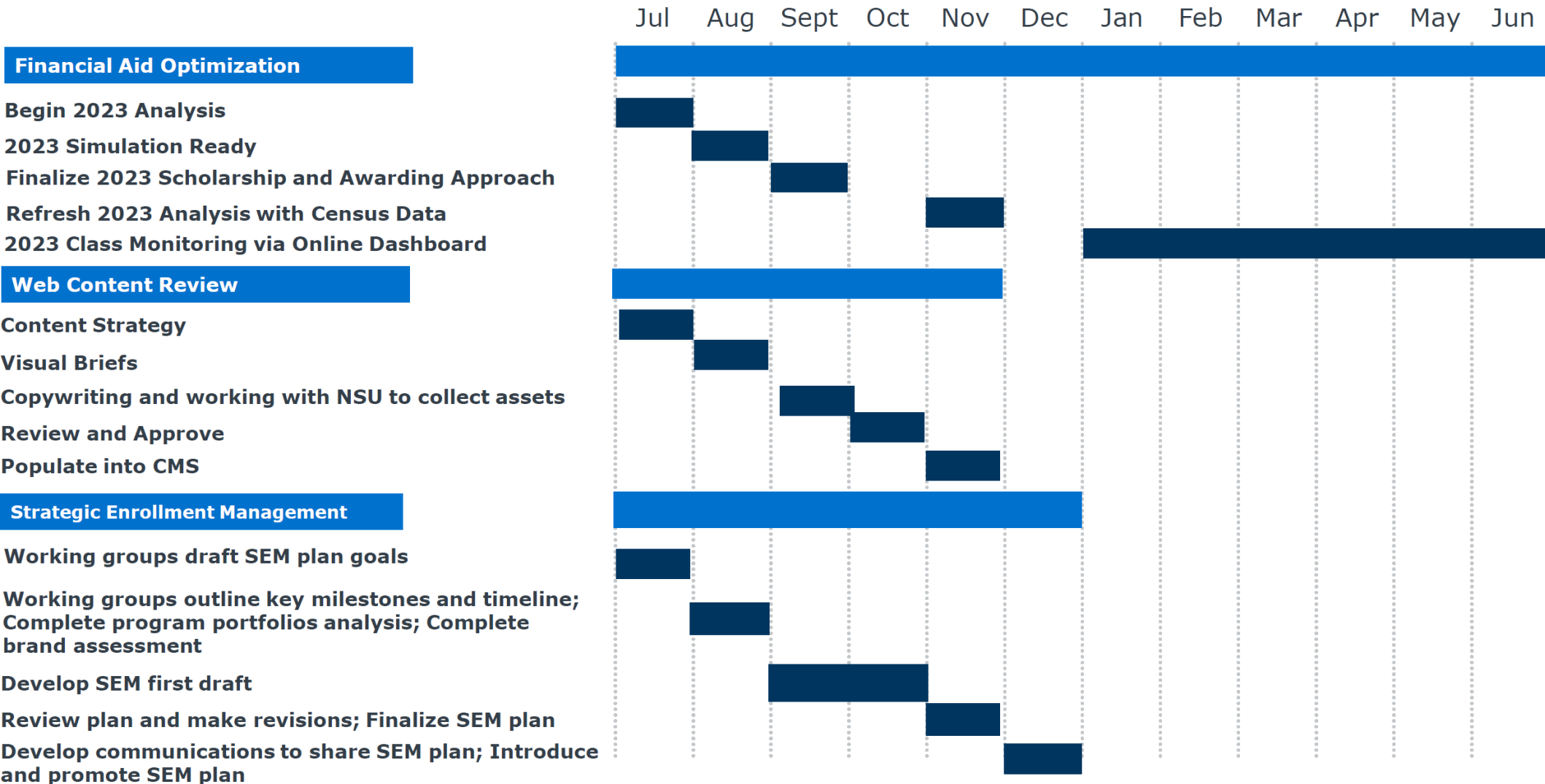
# Northern State University – Year 1 (From executed contract date through June 30, 2022)



# Northern State University – Year 2 (July 1, 2022 - June 30, 2023)



2





Working  
group  
meetings



SEO Audit  
results



Market  
Perception  
Survey  
results

# Thank you!

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