# Project Charter:

**Project Title:** Develop our Strategic Enrollment Plan as the Basis for Integrated University Planning

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**Project Leaders:** Lisa Harris and Jim Munger

## Project Description

- **What is the Challenge?**
  - To be highly effective, an organization of any type must use planning processes that effectively align activities and resources with the mission and strategic goals of that organization.
  - A university can best accomplish that alignment through an integrated planning effort:
    - The Integrated Plan should have at its core a Strategic Enrollment Plan (SEP) that translates our mission and strategic initiatives into proposed changes in academic programming, targets for enrollments (at program level and at the university level), and desired student body makeup.
    - The Integrated Plan, and in particular the Strategic Enrollment Plan, should be produced with consideration of external context (i.e., workforce needs, demand for access, and SBOE strategic initiatives) and internal context (i.e., constraints of infrastructure, finances, and deployment of existing personnel and resources).
    - Planning for infrastructure, recruitment/admissions, budget, and fundraising should be focused on facilitating the achievement of the Strategic Enrollment Plan.
  - The importance of an integrated approach to planning is recognized by our regional accrediting body, the NWCCU. Accreditation Standard 3: Planning and Implementation leads with the following element: “3.A.1 The institution engages in ongoing, purposeful, systematic, integrated, and comprehensive planning that leads to fulfillment of its mission.”
  - Although BSU presently many of the necessary components of an appropriate integrated planning structure, those components are as yet not well coordinated or integrated, nor are they unambiguously aligned with our mission and strategic goals.

- **What is the observable change that will occur as a result of this project?**
  - The creation of a sustainable planning and decision-making body, the Executive Enrollment Committee.
  - The creation of the foundation of the information necessary to plan and make decisions, and to assess the impact of those decisions.
  - The development of a Strategic Enrollment Plan that:
    - Clearly helps us meet the objectives of our mission and strategic plan.
    - Provides clear guidance as to programmatic changes, university-wide and program-level enrollment targets, and targets for student body makeup.
    - Is updated regularly to reflect changes in external and internal demands, constraints, and resource availability.
  - The creation of a structure to ensure the use of the Strategic Enrollment Plan as the foundation for broader integrated planning efforts that would answer fundamental questions such as the following: (i) Who should we recruit and how? (ii) How should we allocate and re-allocate instructional capacity? Where and how should we expand and restrict access to programs? (iii) What changes to infrastructure (e.g., facilities and IT) are necessary?
  - The creation of a planning process that will be in full compliance with NWCCU accreditation standards.
• What activities will the project involve?
  o Create an “Executive Enrollment Committee” (EEC) that has the responsibility for overseeing integrated planning efforts at the university.
    ▪ The specific responsibilities of the EEC will be as follows:
      > Ensure that the university’s integrated planning efforts are focused on accomplishment of the mission and strategic plan.
      > Identify the specific data and analyses that are necessary to support its planning efforts.
      > Understand and apply relevant elements of external context to the planning process, e.g., (i) to what SBOE initiatives and strategic goals should we contribute? (ii) What are the needs in our service area and state for graduates in specific disciplines? (iii) What is composition and size of our college-ready/college-needing populace (e.g., age, ethnic, first generation, socioeconomic, college readiness)?
      > Understand and apply relevant elements of internal context to the planning process, e.g., (i) classroom capacity, (ii) existing distribution of resource and personnel, and (iii) technological capacity.
      > Oversee the creation and regular updating of the Strategic Enrollment Plan, which will translate our mission and strategic plan into proposed changes in academic programming, targets for enrollments (at program level and at the university level), and desired student body makeup, and make that translation in terms of internal and external contexts.
      > Provide direction for the focused planning efforts necessary to support the Strategic Enrollment Plan, particularly in the following areas:
        - Recruitment and admissions: Who should we recruit and how? At what ability levels? With focus on which student characteristics (e.g. ethnicity, first-generation status, disciplinary interest, traditional/non-traditional)? In what geographic areas (e.g., in state or out of state, and if out of state, with waivers or without)?
        - Resource allocation and acquisition:
          ▪ How should we allocate and re-allocate instructional capacity? To specific disciplinary areas to meet external needs? To specific disciplinary areas to meet demand based on student interest? To meet the demands of online/distance students and/or of on-campus students? To create new programs and/or to enhance or re-orient existing programs?
          ▪ In what areas should we focus our fundraising efforts? In what areas should we focus our requests for additional state funding?
        - Information technology and facilities: What changes to infrastructure (e.g., facilities and IT) are necessary to support the changes we wish to make?
    ▪ The EEC will be co-chaired by the Vice President for Student Affairs and the Provost and Vice President for Academic Affairs. The composition of the EEC will include representation from the following areas: Academic Affairs, Student Affairs, Finance and Administration, University Advancement, Marketing and Communication, Faculty Senate, and ASBSU.
  o Create an initial Strategic Enrollment Plan (accomplished by the EEC) to address the following questions:
    ▪ What is our present situation? How well do we presently fulfill mission and strategic goals, and how well we meet the needs of our external constituencies?
      > What are our present enrollments by program, distribution of instructional capacity,
      > How well do we presently meet needs for graduates in particular fields, how well do we provide
access to our programs? Do we have capacity in the places needed for our students to be able
to finish their programs?

- What needs to change and how should we accomplish that change?
  - What new academic programs are needed? What programs are no longer needed?
  - In what programs do we need to increase capacity to meet external demands? How do we deal
    with situations in which demand by students for particular programs does not match capacities
    of those programs? That is, to what degree do we (i) attempt to shift demand (via recruiting
    practices) to programs with excess capacity vs. (ii) revise existing programs to better meet
    existing demand vs. (iii) shift resource capacity from low demand programs to high demand
    programs?

- Create and initiate a process for “Academic Program Alignment Analysis.” This aspect will be roughly styled
  after the “program prioritization” of Dickeson, and will have the purpose of (i) giving a program-by-program
  understanding of how well each of our academic programs is aligned with our mission, strategic goals,
  external need, and internal demand, (ii) providing guidance for a shift in alignment of programs, where
  appropriate, to better serve need/demand, and (iii) providing guidance as to which, if any, programs might
  be discontinued and which new ones should be created. This process will initiate with a seminar presented
  by personnel from the University Leadership Council, followed by work to develop an agreed-upon set of
  measurements and criteria for evaluation of programs.

- Create an informational foundation to support planning and decision making by developing sustainable,
  reliable, and easily accessible sources of information regarding the following listing. This effort will be
  conducted by a subgroup of the EEC, with additional help from institutional support personnel.
  - Workforce needs: in what specific disciplinary areas is there demand for graduates?
  - Facility, infrastructure, and instructional capacity: What is the capacity of the university to offer
    courses: in each discipline, at each level, and in each format, etc. What is the cost of adding additional
    capacity?
  - Student demand/need: What are enrollment trends in existing programs, and how do they translate
    into need for capacity in courses, advising, student support, etc.
  - How well are we accomplishing the objectives that we create from our planning efforts? What are
    performance indicators and what do they indicate?

- Who will need to be involved?
  - Determination of the specific charter of the EEC will require appropriate representation from the list of
    participating entities.
  - Creation of the initial Strategic Enrollment Plan will be the charge of the entire EEC.
  - Creation of the process/structure for Academic Program Alignment Analysis will require substantial input
    from Academic Affairs representatives.
  - Creation of the informational base will require broad input from the EEC as to what information is needed,
    and then will require work by the Office of Institutional Research and by Business Intelligence and Reporting
    Services to develop the specific sources of information.

- How Will We Know the Project is Over?
  - The EEC will have a well-defined charter.
  - An initial Strategic Enrollment Plan will have been developed.
  - The process and structure for Academic Program Alignment Analysis will be successfully defined.
  - The sources of necessary information will have been identified, and necessary reports will be developed and
analyses conducted.

- How will we know if the project has been successful?
  - We will be recognized by NWCCU evaluators as having an excellent integrated planning process.
  - Admissions, Facilities, and IT will have a basis for their planning efforts.
  - Change in the university’s student profile to match up with that defined by the Strategic Enrollment Plan.
  - Better alignment of course availability to course demand.
  - Increased resource allocation to programs with greatest student demand.
  - Increased enrollments in programs presently undersubscribed.

Project Scope

Broad description of what is and what is not in the scope of the project:

**In scope:**
- Creation of the Executive Enrollment Plan.
- Creation of an initial university-level Strategic Enrollment Plan
- Creation of a structure/set of guidelines to facilitate subsequent development of program-level enrollment plans.
- Creation of guidelines to guide Academic Program Alignment Analysis.
- Creation of the informational structure necessary to inform planning efforts.

**Out of scope:**
- Creation of program level enrollment plans
- Creation of an admissions/recruitment plan.
- Creation of a facilities/IT plan.
- Implementation of the process for academic program alignment analysis.

Key Documents to be Created (to provide a record of our activities)

**Standard Documents**
- Project Charter
- Project Work Plan
- Communication Plan
- Retrospective

**Additional Documents**
- Strategic Enrollment Plan

**Estimated Project Start Date:** We have already started: the EEC has been formed
## Estimated Project resources necessary

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<th>Non-personnel $$</th>
<th>New FTE and cost</th>
<th>Existing FTE</th>
<th>Backfill $$ for existing FTE</th>
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<tbody>
<tr>
<td><strong>FY13:</strong></td>
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<td>• $20,000 for consultants to facilitate planning.</td>
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<td>A number of individuals will participate in planning efforts as part of their present positions</td>
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<td>• $15,000 to hire student help to construct data warehouse reports</td>
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<td><strong>Ongoing Costs</strong></td>
<td>Additional one-time funds in FY14:</td>
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<td>(FY14 and beyond):</td>
<td>• $10,000 for consultant to facilitate program level planning.</td>
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### Potential Project Funding Source(s):

**Will non-team personnel be required?** Y / N

**If Yes, what resources will be required and for what purpose?**

### Approved To Proceed

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<th>Date</th>
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