A Tableau Tool for Strategic Enrollment Management

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Institutional Research and Decision Support

IUPUI

Our Presentation Today

1. Philosophy of Strategic Enrollment Management (SEM)

2. IUPUI Institutional Research and Decision Support project to assist with SEM

3. Demonstrating Reports

   – Course Enrollment Point in Cycle

   – Admissions Funnel

   – Enrollment and Orientation Point in Cycle

4. Where we go from here

We did not do this alone! Thank You!

- Michele Hansen

- Cheryl Stine

- Stephen Hancock

- Jessicah Rauch

- Clif Marsiglio

- Barb Dobbs
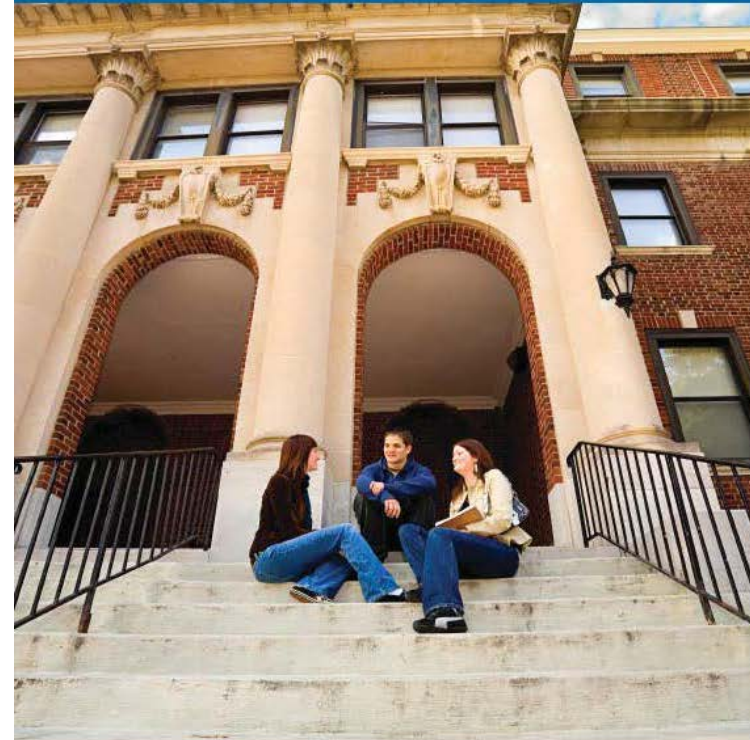
- Nicole Collins

- Melissa Pollauf

What is Strategic Enrollment Management?

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1. "a comprehensive approach to integrating all of the University's programs, practices, policies, and planning related to achieving optimal recruitment, retention, and graduation of students" (Wilkinson, Taylor, Peterson, & de Lourdes Machado-Taylor, 2007)

2. Integrated with mission, vision, strategic plan.

3. Holistic – entire career considered

   – Not *just* recruitment.

4. Student success is an enrollment management function!

A PRACTICAL GUIDE TO STRATEGIC ENROLLMENT MANAGEMENT PLANNING

R.B. Wilkinson
Pittsburg State University

James S. Taylor
University of Aveiro
or Research in Higher Education Policies, Portugal

Angé Peterson,
University of Central Florida

Maria de Lourdes Machado-Taylor
r Research in Higher Education Policies, Portugal

IUPUI

Optimize Enrollment Management

"IUPUI will create a strategic and coordinated enrollment management plan to attract, retain, and graduate better prepared, more diverse students who choose IUPUI first for its vibrant urban location, leading academic programs, and culture of learning in engagement with local, regional, national, and global communities."

Optimize Strategic Actions

1. Implement a strategic, proactive enrollment management plan to expand enrollment of undergraduate, graduate, and professional students at the Indianapolis campus and increase the number of degrees awarded at the baccalaureate and graduate/professional levels.

2. Shorten the length of time needed to complete an undergraduate degree.

3. Establish a Division of Enrollment Management led by a senior-level administrator charged with implementing the campus's enrollment planning and management activities.

4. Implement recruitment and retention strategies and ensure that the campus policies, processes, and data infrastructure necessary for accomplishing goals are in place.

IUPUI Institutional Research and Decision Support (IRDS) project to assist with SEM

SEM 360 project

1. Previous Microsoft Reporting Services

   – Want something more interactive

2. Better back-end data

3. Better drill down capability

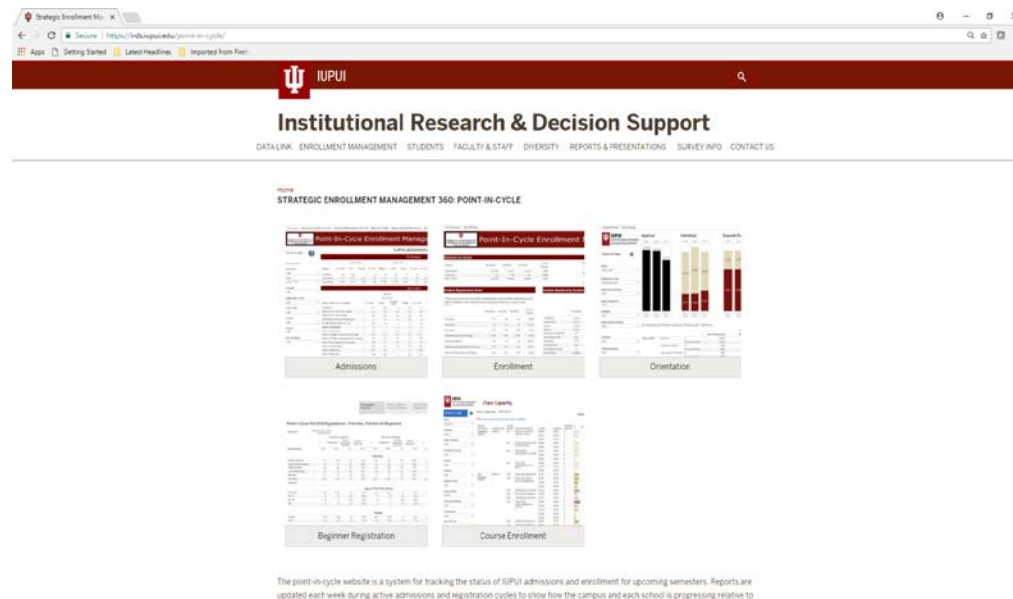   – School/Program

   – Demographics

SEM 360 project

1. Help with several decisions

    – Enrollment projections

    – Diversity enrollment

    – Optimal number of class sections

        • Close sections or open more?

    – Course enrollment trends

2. One big system → Series of reports

SEM 360 project

- Rebuild Existing Point-in-Cycle (PiC) reports

- Original Prototype (thanks again Cheryl!)

- Refine data visualizations for IUPUI

- [Final product](#)

Report Demonstration

Course Enrollment Point-in-Cycle

- Serves as a tool to monitor course enrollment to determine if an increased class capacity may be needed.

- Assist planning for future semesters.

- Consists of both real-time and historic trend data.

Course Enrollment Point-in-Cycle

Main Reports:

- **Class Capacity** provides a view of all courses offered.

- **Class Capacity - Combined Sections** looks at courses where multiple sections are taught together at the same time and place.

- **Class Capacity - Block Enrollment Classes** includes Block enrollment sections where two or more courses must be taken together.

- **High/Low Capaity** looks at courses where enrollment capacity >= 90%, below 10 head counts or that are potentially affected by the institutions' low course enrollment policy.

Course Enrollment Point-in-Cycle

Sub-Reports:

- **Class Faculty Attributes** provides information on primary instructor by class number, component, class status, and number of waitlisted students.

- **Class Student Attributes** provides information on students enrolled in the course by major, race/ethnicity, average high school GPA, cumulative GPA, and average transfer credit hours and others.

- **Enrollment by Group** provides enrollment headcount and percent to capacity by week day and time offered and by mode of instruction.

- **Class Enrollment Trends** displays historic enrollment trends over time to allow point-in-cycle comparison.

Admissions Point-in-Cycle

- Updated weekly

- View by Admissions Cycle/or Semester

- Intended majors groups Pre- and Direct Admits

- Sub-reports available :

    - By Admit Type

    - Demographic Profile

    - Beginner Profile (Academic Readiness)

    - Funnel by School

    - Trends

Orientation Point-in-Cycle

- Helps determine if additional Orientation sessions are needed.

- Updates weekly combining Admissions and Orientation data

- Indianapolis Campus Only

- Indicates Orientation status:

    - Reserved an Orientation time

    - Attended Orientation

    - Not Yet Reserved

- Would like to add Housing data

Next Steps

Next Steps

1. Enrollment

   – Student Level Data

2. Orientation Point-In-Cycle

   – Add housing information

3. Course Enrollment

   – Add transfer credit information

Questions?