



IR Role in Supporting Strategic Enrollment Management

Association for Institutional Research Forum – May 31, 2018

Welcome and Introductions

IUPUI

- Recognized for Learning Communities & the First Year Experience (U.S. News).
- For 13 consecutive years, U.S. News has highlighted IUPUI for offering programs that help ensure a positive collegiate experience for new freshman and undergraduates.
- Large Urban Public Research University.
- Student population of about 30,000 students.
- First-Time cohort just over 3,800 and New External Transfers just over 1,300 each year.
- Over 250 degree programs from both Indiana & Purdue Universities, guided by the Principles of Undergraduate Learning.
- Approximately 40% undergraduates are Federal Pell Recipients and 35% are First Generation College Students.
- About 50% of First-Year students commute to campus .



Outline

1. Introduction of Strategic Enrollment Management (SEM)
Core Principles and Framework
2. Enrollment Management at IUPUI
3. How IR is organized to Supporting the Core Principles of Strategic Enrollment Management (SEM)
4. Demonstration of the types of IR data reports and investigations that were developed to support SEM including interactive data reports using Tableau



Strategic Enrollment Management (SEM) at IUPUI

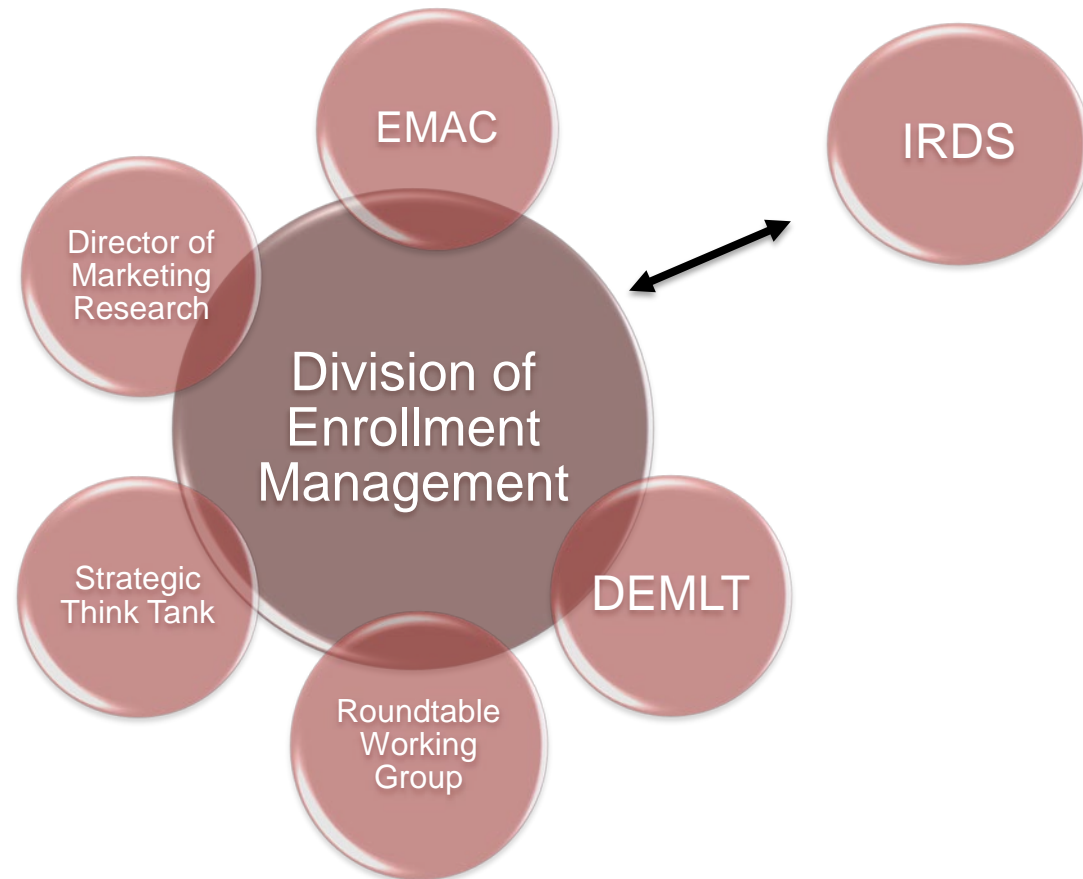
Core Principles of SEM

1. Establishing clear enrollment goals
2. Promoting student success
3. Determining, achieving and maintaining optimum enrollment
4. Enabling the delivery of effective academic programs
5. Generating tuition
6. Enabling financial planning
7. Increasing organizational efficiency and improving service

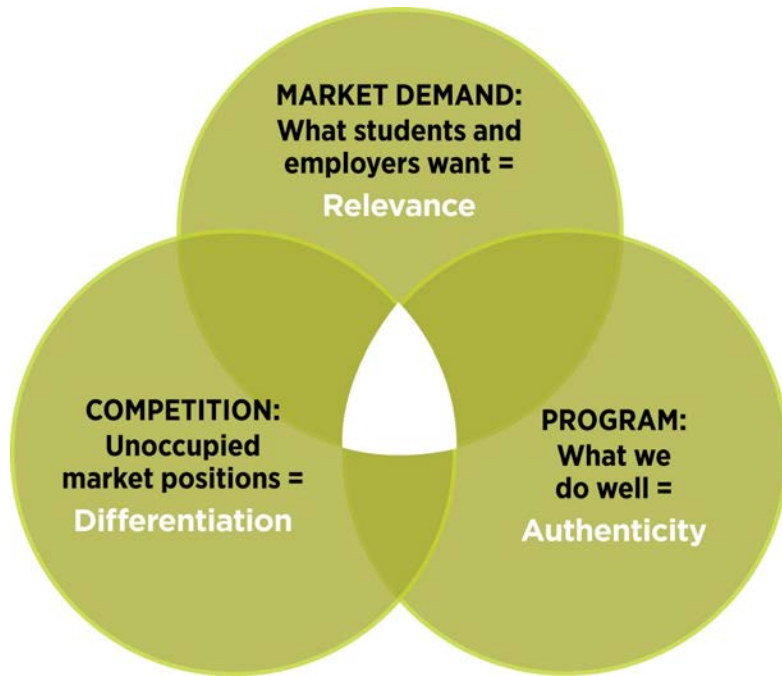
Source: A Practical Guide to Strategic Enrollment Management by Wilkinson, Taylor, Pederson, & Machado-Taylor, 2017 <http://www.educationalpolicy.org/pdf/SEM%20Guide.pdf>



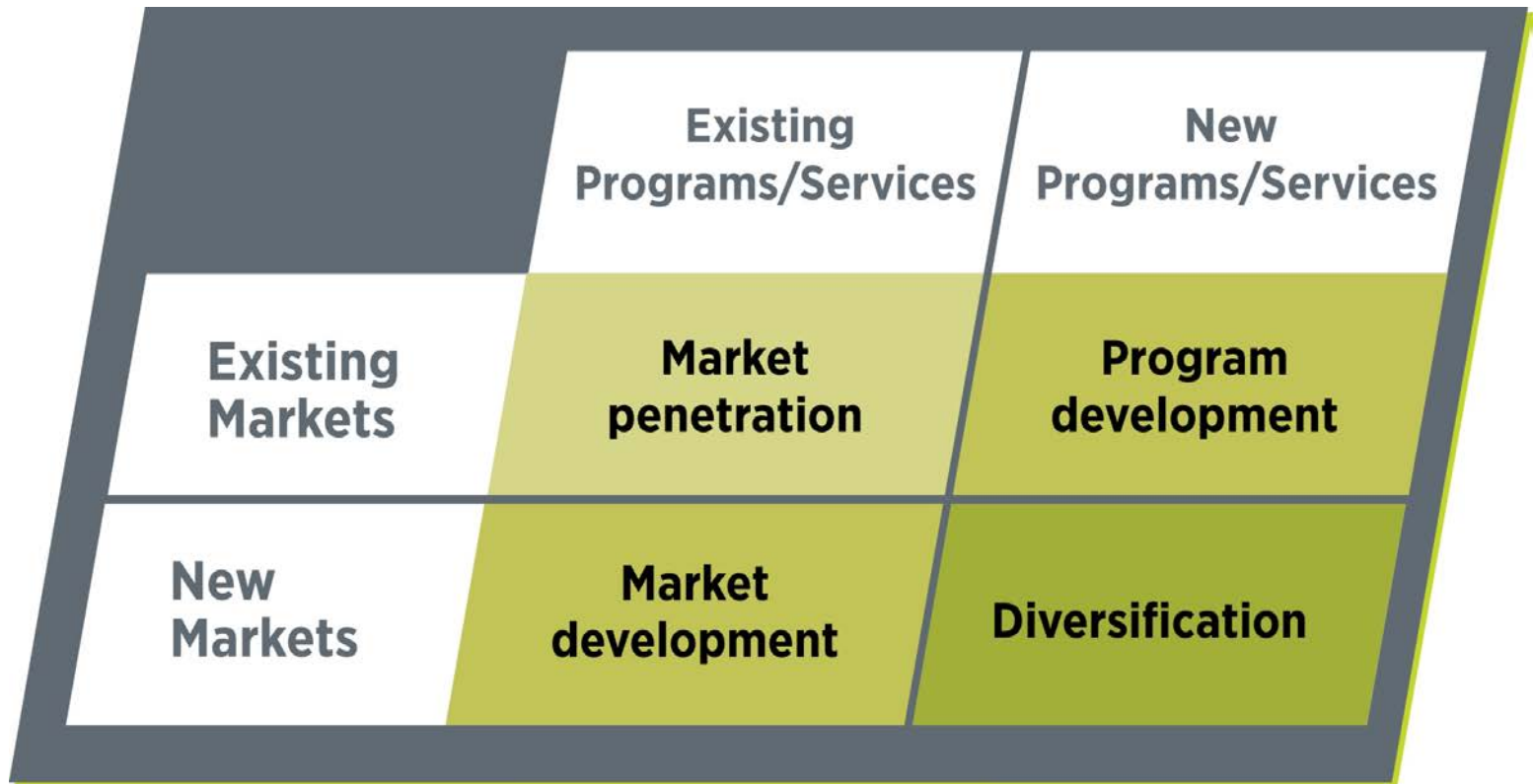
Infrastructure to Support Data Driven Approach For Enrollment Management



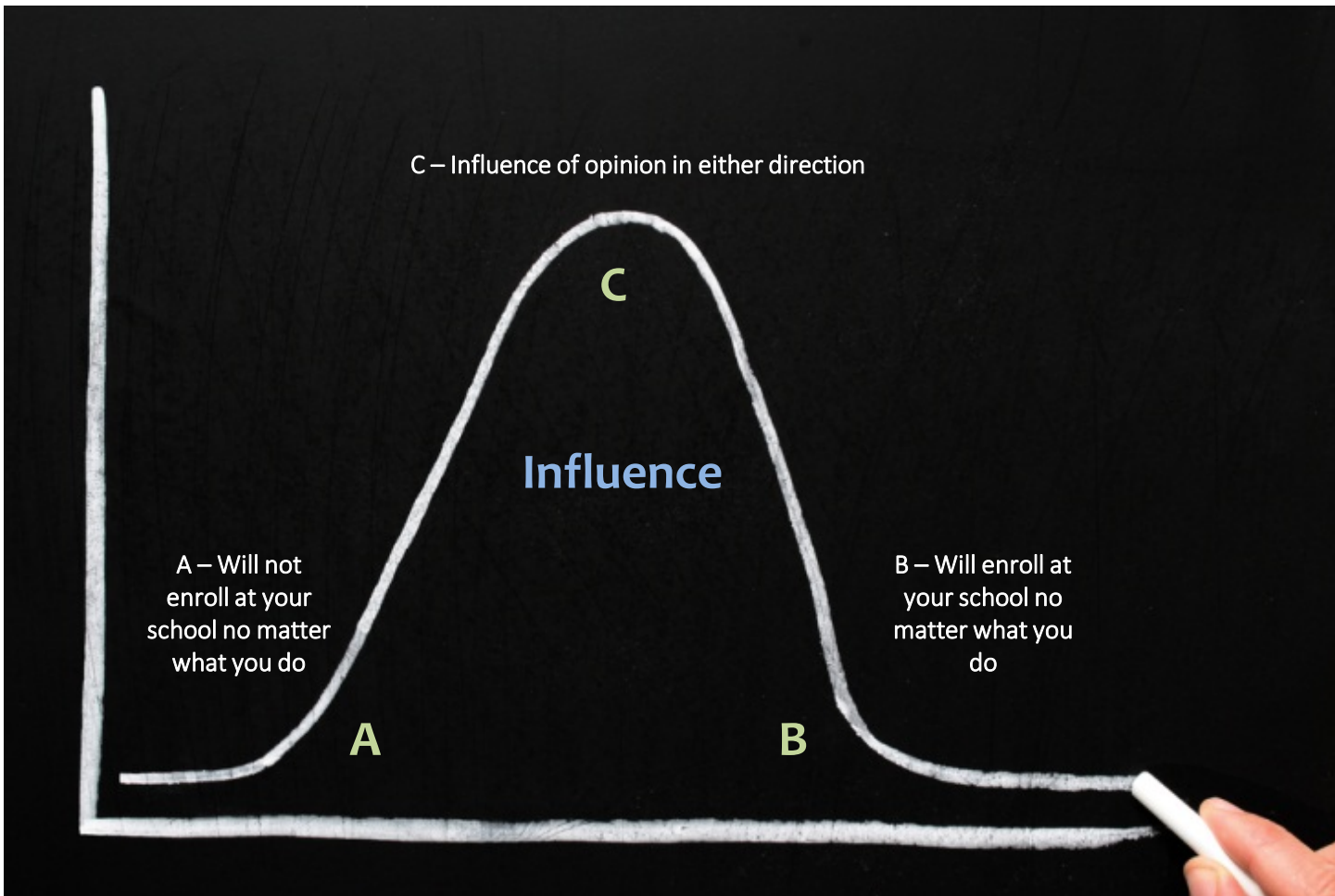
Key Strategy in Supporting SEM – Leveraging the Brand



Key Strategy in Supporting SEM – Analyzing Market Demand



Key Strategy in Supporting SEM – Understanding Student Behavior



IRDS Organized to Support the Core Principles Of Strategic Enrollment Management (SEM)

IR Role in Providing Data Reports and Investigations to Support SEM

1. Optimizing Enrollment Management Strategic Plan Indicators and Progress
2. SEM 360 Point-In-Cycle
 - Course Enrollment
 - Orientation
 - Institutional-and school-level applicants, admits, and enrollment including credit hours
 - First-Time, Full-Time Beginner Registration
3. Enrollment Projection Models
4. Assessments of the effectiveness of financial aid packaging and student success initiatives



IRDS Vision/Mission

*We provide timely, accurate, and actionable information to support decision making at IUPUI. Decision makers have the information necessary to achieve maximum effectiveness in regard to IUPUI's Strategic vision, mission, values, and goals related to **the success and learning of our students** as well as overall institutional effectiveness. Our vision is to be a nationally recognized leader in institutional research and decision support in higher education.*



Institutional Research and Decision Support Context

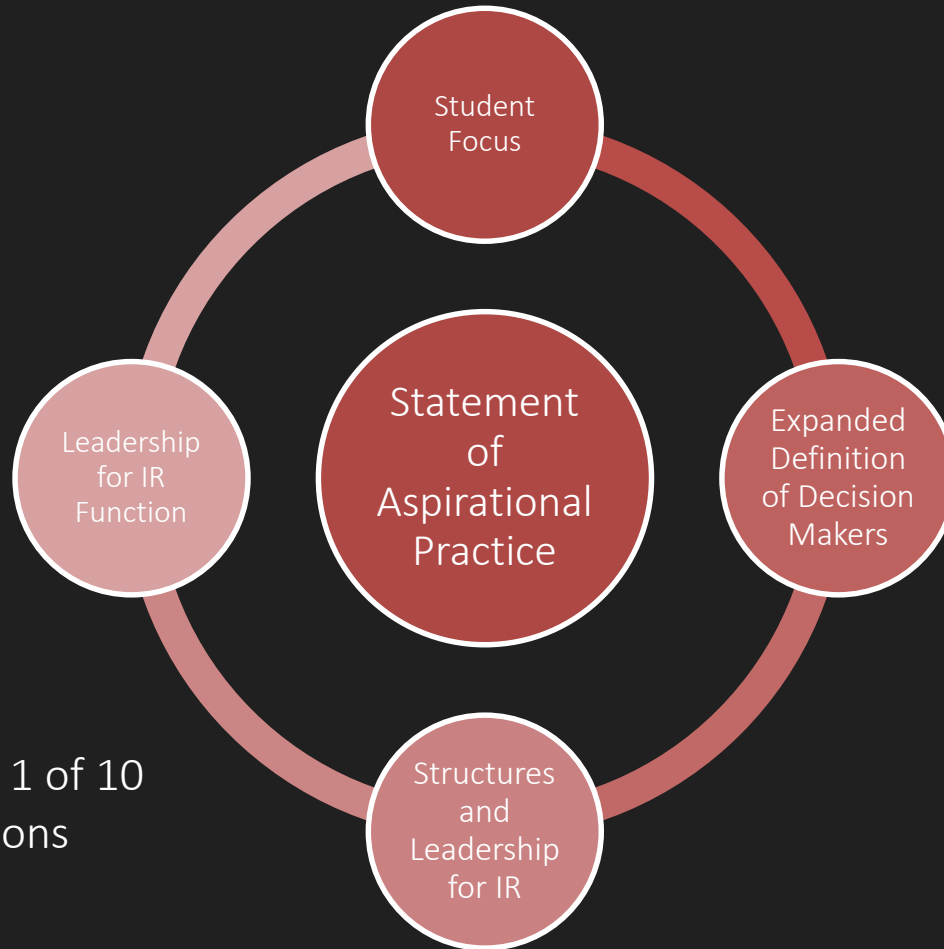
- IRDS new office in August 2015.
- Reorganized all data-generating, decision support offices under one structure to leverage expertise and integrate data across units.
- Had opportunity to organize new office guided by Statement of Aspirational Practice for Institutional Research.



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Statement of Aspirational Practice For Institutional Research – Association of Institutional Research (AIR)



IUPUI Selected as 1 of 10
Founding Institutions



IRDS Activities and Reports to Support Decision Making

Institutional
Research
(Retention and
Graduation
Rates)

Strategic
Enrollment
Management

Assessment of
Student Learning
and
Development

Survey Research
Methods

Program
Evaluation and
Program Review
(assessing what
works and what
needs
improvement)

Institutional and
Strategic
Planning Decision
Support



IRDS Data Investigations Examples

Definition of Unmet Financial Need

The National Common Data Set provides a framework for calculating a student's academic year financial need that is "met" by different sources of financial support.

Unmet Need is the portion of a student's academic year financial need that exceeds these forms of financial support.

Calculation Example

Cost of Attendance (COA)

Tuition/fees, housing/meals, books/supplies, travel, and personal expenses = \$24,000

Expected Family Contribution (EFC)

A FAFSA-driven expectation of family financial support - \$10,000

Gift Aid

Scholarships, grants, etc. from federal, state, IUPUI, and private sources - \$1,000

Self-Help Aid

Subsidized federal loans and federal work study earnings - \$8,000

Difference is **Unmet Need** = \$5,000*

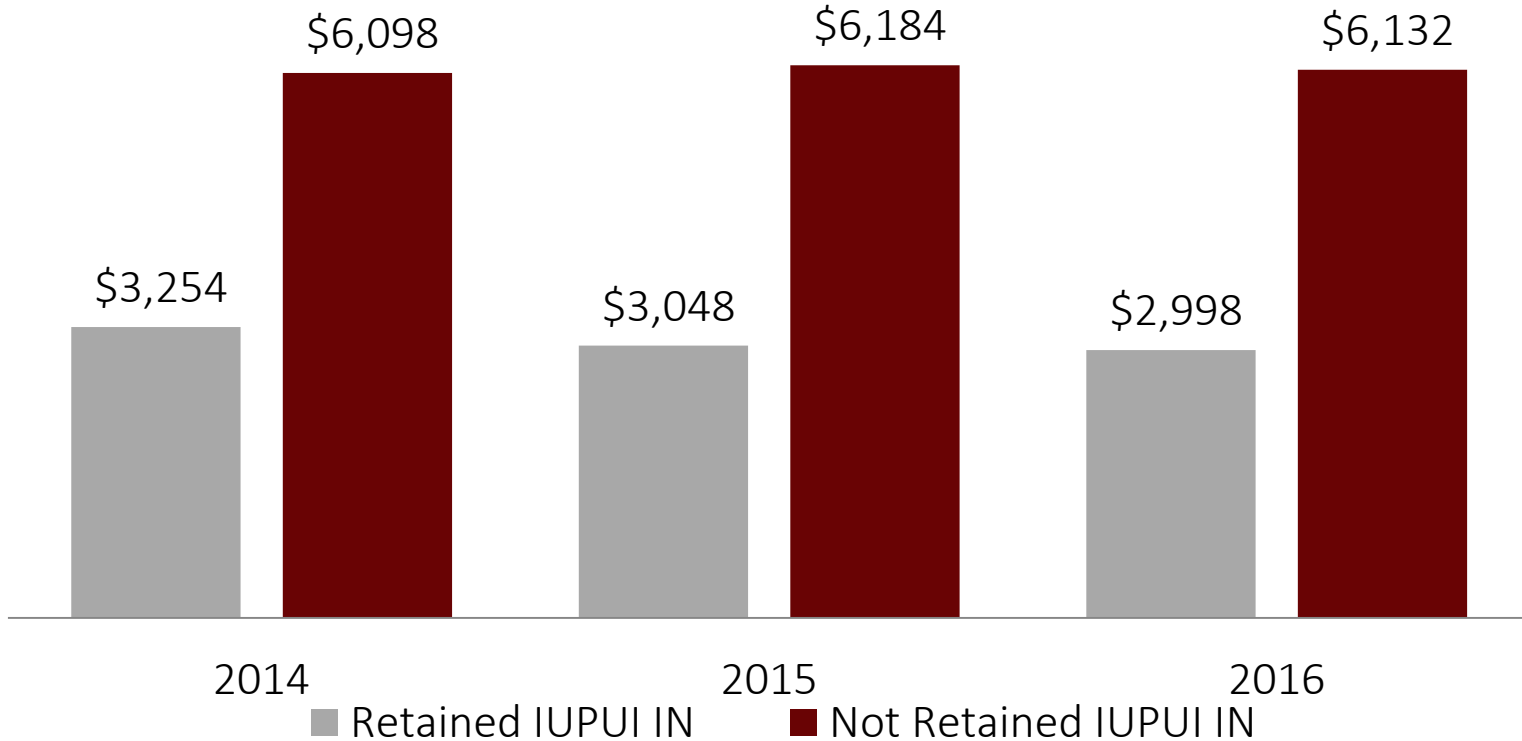
* Students must take out unsubsidized loans, private loans, or work to support unmet need



IRDS Data Investigations Examples

Annual Unmet Financial Need and One-Year Retention FT, FT Beginners

Total Unmet Financial Need Academic Year
Common Dataset Definition



Retained and Not Retained Ns (2014=2162;1033), (2015=2236; 995), (2016=2365; 1038)



Unmet Financial Need Academic Year Fall 2016 IUPUI Indianapolis	N	% of All
No FAFSA on file	4,092	21%
No Unmet Financial Need (FAFSA on file)	5,120	26%
\$1 to \$1000 Unmet Need	827	4%
\$1001 to \$2000 Unmet Need	760	4%
\$2001 to \$3000 Unmet Need	711	4%
\$3001 to \$4000 Unmet Need	615	3%
\$4001 to \$5000 Unmet Need	744	4%
\$5001 to \$6000 Unmet Need	802	4%
\$6001 to \$7000 Unmet Need	880	4%
\$7001 to \$8000 Unmet Need	701	4%
\$8001 to \$9000 Unmet Need	623	3%
\$9001 to \$10,000 Unmet Need	511	3%
More Than \$10,000 Unmet Need	3,196	16%
Grand Total	19,582	100%



Building a Capacity for SEM Decision Making

- Understand anatomy of decision making
- Data infrastructure
- Relationship building
- Access to decision makers
- Building capacity for others (outside of IR) to collect data appropriately
- Technology (Tableau self service interactive reports) that allows for decision makers to have access to data
- Ongoing training, consultation, and support



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IR Leadership and Creating a Data-Informed Decision Cultures around SEM

1. Matrix Network Model of Institutional Research

- We have small teams within IRDS who work collaboratively with decision makers in schools and in units to ensure that that we are providing them with quality information and data tools so that they are empowered and effective decision makers. Process is integrative, nimble, and data is actionable and aligned with strategic planning decisions.

2. Leveraging Data Analytic Power with Formation of *Strategic Information Council and Data Workshops*

- Chaired by Executive Vice Chancellor and charge to leverage all data/information resources across campus (e.g. IRDS Reports and Investigations, Academic Analytics, Education Advisory Board Student Success Dashboards and Risk Indicators, Digital Measures Activity Insight, Student, Faculty, and Staff Surveys, and more) and composed of leaders with decision making expertise and power/position to implement.
- Offered series of Data Workshops to Enhance Data Literacy Across Campus and Leverage Use of Data Tools

3. *Data Inquiry Group (DIG)*

- Group composed of heavy data users/analysts in schools (very decentralized environment). Formed group to leverage data and analytic tools. Facilitate dialogue around data-driven decision making (data quality, literacy, use, capacity, and transparency) We all serve as *data coaches* for university.



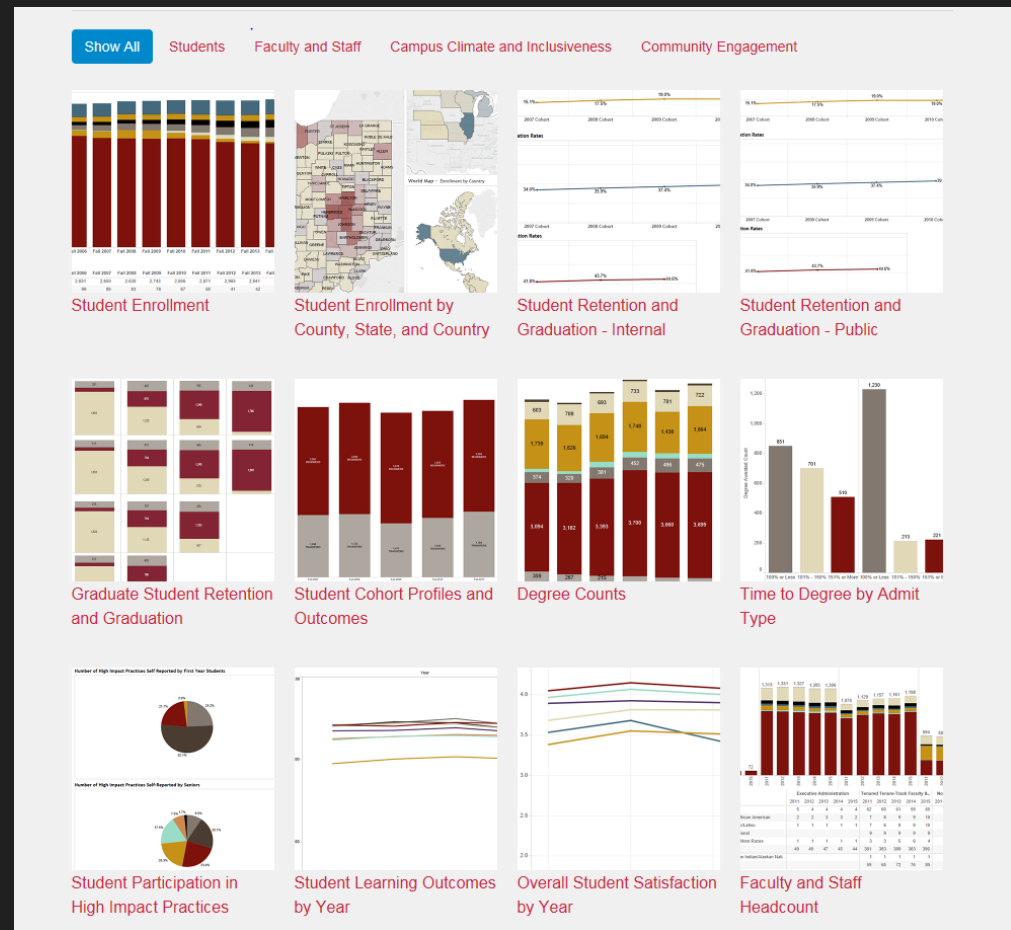
Demonstration of the IRDS Data Reports, Projections, and Investigations

Redesigned Website with Accessible Self-Service Data Tools

Institutional Research and Decision Support

<https://irds.iupui.edu/>

Contains highly interactive dashboards allow users to drill down and filter to allow detailed exploration of key indicators associated with the IUPUI Strategic Plan.



SEM 360 project

Better back-end data

- Previous Microsoft Reporting Services
- Want something more interactive

Better drill down capability

- School/Program
- Demographics

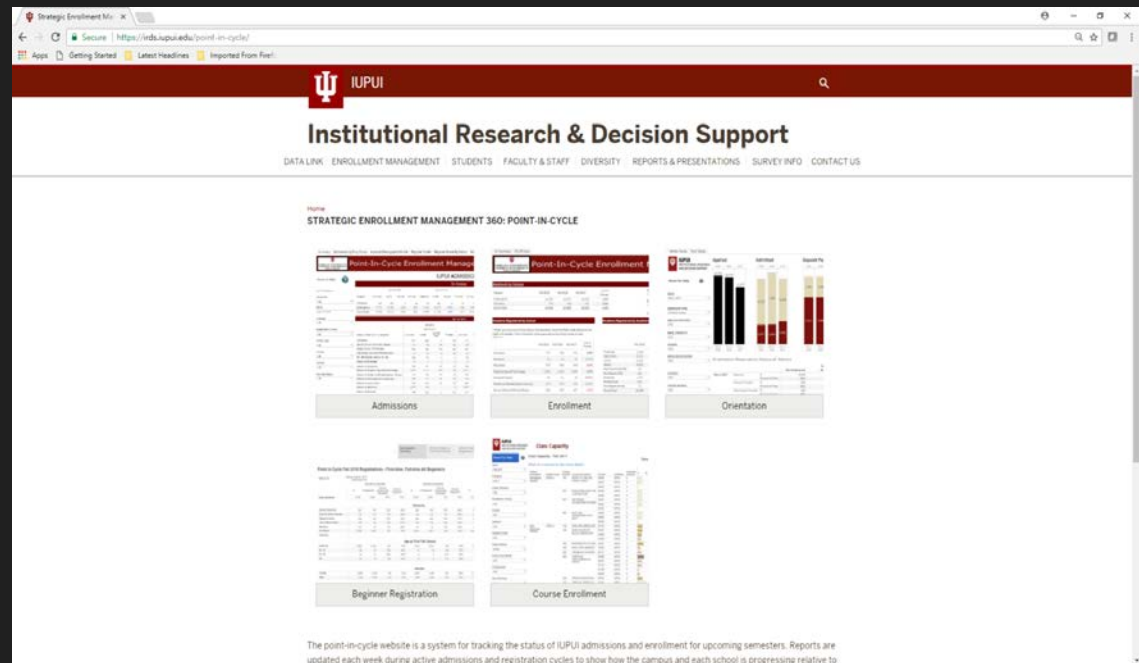
Help with several decisions

- Enrollment projections
- Diversity enrollment
- Optimal number of class sections
- Course enrollment trends



SEM 360 project

1. Rebuild Existing Point-in-Cycle (PiC) reports
2. Original Prototype
3. Refine data visualizations for IUPUI
4. [Final product](#)



Enrollment Projections

1. Began with Fall 2016 Admissions cycle
2. Rolling averages
 - Total Enrollment
 - Beginners
 - Transfers
3. Specific populations



SEM 360 Highlights

1. Role - Liaison between IRDS and various Enrollment Management offices
2. Report development for trend data and support various offices with their Operational report development
3. Attend regular DEM meetings
4. McGuire Data support



Presenters

Division of Enrollment Management



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Institutional Research and Decision Support (IRDS)



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Presentation found at <https://irds.iupui.edu>

Under Reports and Presentations-Conference Presentations AIR