



The Recruitment and Outreach Scorecard: Moving from a Tactically Driven to Strategically Focused Enrollment Office

In the first publication of this whitepaper we quoted Bill Fitzsimmons, Harvard's dean of admissions and financial aid, who said that 2008 was "a year in which there was more uncertainty than I've experienced in over 30 years of admissions." We doubt there are many enrollment management leaders who would say that their experiences since 2008 have been any different. If anything, the uncertainty has escalated.

In its *2009 State of College Admissions Report*, the National Association for College Admission Counseling (NACAC) reiterated the growing complexity of the admissions process. The challenges enrollment officers face are numerous. Consider the following:

- Institutions are receiving record numbers of applications, yet yield rates are declining.
- Undergraduate students are applying to and depositing at more institutions than ever before (often aided by the ease that common applications provide), as they weigh their options based on price and value.
- Demographics are shifting significantly. The U.S. expects to see an overall decline in high school graduates in the coming decade, but a growing percentage of this population are from low-income and first-generation backgrounds.
- The role of social media is growing exponentially, resulting in what has been described as a state of "perpetual motion and little control." (The Chronicle of Higher Education, *Colleges Using Technology to Recruit Students Try to Hang on to the Conversation*, May 2009).
- The effects of the recession have had a considerable impact on student college choice, with many more choosing to enroll at public institutions vs. private, and community colleges vs. 4-year institutions.

Today, recruiting and admissions officers realize they cannot simply focus on "filling the class" as institutional ratings, accrediting bodies, and state funding formulas increasingly reward institutions for enrolling students who persist to degree completion. Identifying those students who are a good fit for the institution and have a likely chance of success becomes even more critical.

Considering these factors, we believe the topic of recruiting and outreach scorecards is even more relevant today than it was in 2008. While we cannot control the economy or the ubiquitous nature of social media or student consumer attitudes, we *can* choose to craft an intentional strategy to guide us in navigating these challenges, charting a course for success, and making decisions about resource allocation.

Yet it is not sufficient to have a comprehensive strategy unless we implement a process for executing that strategy and a system to measure and monitor our progress in achieving our goals. That is why the recruiting and outreach scorecard is essential.

As you read this paper, ask yourself:

- Do we have a written enrollment management strategic plan that can help us address these new challenges?
- If so, does this sit on a shelf for an annual review, or is it a dynamic document that guides our day-to-day activities and articulates our priorities?
- Have we specified clear enrollment goals and outlined objectives, performance indicators, targets, and initiatives to achieve our goals?
- How frequently do we measure and monitor our progress? Do we have an effective system to capture data and graphically display our progress?
- How effectively do we share information with internal and external stakeholders?

The recruiting and outreach scorecard can serve as an essential component of your plan by providing timely updates on your progress so you can take quick action to address issues and change course as necessary. But the scorecard is only as effective as your strategic plan, your data systems, and the performance culture of your department and institution. The execution of your strategy truly depends upon an alignment of your people, your process, and your technology, and the recruiting and outreach scorecard can help bring these elements together.

—Chrissy Coley, Ph.D., Senior Strategic Consultant for Performance Management, SunGard Higher Education.

EXECUTIVE SUMMARY

Given declining state budgets and rising competition, college and university enrollment offices are being asked to do more with fewer resources. While institutions have moved toward a more strategic approach to managing prospective student enrollments, many struggle to build the organizational commitment necessary to support their plans. Actually executing well-thought out strategies, linking cause and effect, and realizing a better return on institutional resources invested are key challenges. In the words of one author, “strategies are intellectually simple, their execution is not.”

Growing and shaping enrollments is a common and intended goal for many. Some colleges and universities are better than others when it comes to attaching real numbers to these goals, but in our experience most plans underperform when it comes to aligning strategy with execution. These strategic bridges to nowhere fail to provide an infrastructure where vision, people, management, and resources come together seamlessly in support of common goals.

One emerging idea to overcome the strategy-execution divide is to implement a recruitment and outreach scorecard that can help your institution align action with intent, cause with effect, and measure leading and lagging indicators of performance. More than an approach to funnel metrics, a scorecard presents assessment measures in the context of your enrollment strategy, aligning expected outcomes with actual results.

Used strategically, the scorecard can reflect the value of your recruitment, marketing, admission, and registration efforts. Enrollment staff at all points of service benefit from seeing how their activities affect goals. And with a clear picture of performance, senior management and institutional leadership are free to focus on desired performance outcomes.

A DIFFICULT ENVIRONMENT

Enroll an academically-talented class. Increase the number of under-represented students. Grow out-of-state or international enrollments. Increase the number of enrolled adult-learners. These are common refrains heard across colleges and universities of all shapes and sizes. Yet in today’s environment, the challenges are immense. Rising competition, demographic shifts, declining funding, and a tough public policy environment are just a few of the tribulations enrollment professionals face. Despite the last decade’s growth in high school graduates and the explosion in adult learners, growing and shaping your desired class and predicting yield has reached a new level of difficulty. Bill Fitzsimmons, Harvard’s dean of admissions and financial aid, reported that 2008 “was...a year in which there was more uncertainty than I’ve experienced in over 30 years in admissions.”

Growing enrollment, increasing under-represented populations, and improving the academic indicators of enrolling classes may all be goals you’re asked to achieve, but they can also be at odds with one another and pit institutional priorities against each other. As one experienced admissions professional told me recently, “my job is really to be the Dean of Conflicting Interests.”

In this environment, clearly communicating what it takes to enroll your desired class and defining the performance indicators that drive success is an imperative. Yet, while the discipline of enrollment management has dramatically transformed itself in recent years, our systems of measurement are firmly mired in the past. With the increasing number of software systems in use on campus, marshalling the resources to execute endless ad-hoc reports limits the use of real-time information. Executing effectively in a difficult environment requires a level of transparency, information access, and organizational alignment not common in today's higher education environment.

ENROLLMENT ACCOUNTABILITY

Make no mistake, the enrollment office—whether for undergraduate, professional or graduate students, or continuing education learners—is one of the most accountable entities on the campus today.

But simply counting inquiries, applications, and registrations received, or admission offers made, no longer provides the insight you need to proactively manage prospective student enrollment. With students 'secret shopping,' lingering in cyberspace, and not pursuing a prescribed path to an enrollment decision, funnel metrics alone are not predictive of enrollment outcomes. More often than not, today's enrollment process is a path with alternate entry and exit points, a complex network of information, influencers, and decisions.¹ In this environment, leading measures of student intent and engagement are needed to more accurately forecast outcomes.

Think about the myriad of activities you engage in on an annual basis to attract, engage, and enroll prospective students. From direct mail, advertising, and travel, to campus visit programs and yield events, the typical enrollment office is a beehive of marketing and outreach activity. And increasingly institutional leaders are demanding a return on these expended resources. One of the many challenges for the enrollment manager is to not only hypothesize, but to demonstrate a measurable relationship between these initiatives and desired enrollment outcomes.

THE STRATEGY-EXECUTION CHASM

There is no shortage of strategy in higher education. A recent Google search using the term 'college university strategic plan' yielded over 8 million pages!² In the field of enrollment management alone, a lot of ink has been spilt on the topic of enrollment strategy. From concepts such as Strategic Enrollment Management (SEM) and Strategic Enrollment Planning (SEP), to dedicated enrollment management-focused conferences, higher education leaders have an abundance of paradigms to choose from to organize their efforts.

But not unlike their business-world counterparts, colleges and universities often suffer from an inability to execute. Using corporate America as a proxy, the sobering fact is that 9 out of 10 organizations fail to implement their strategies.³ It is one thing to craft a seemingly well-thought out plan, but actually delivering it is another thing entirely. Why does this happen? Research and experience suggest four common barriers:

Unclear Vision

Fundamentally, the people responsible for executing your enrollment strategy—enrollment counselors, associate and assistant directors, and managers—may not understand the big picture, or how their actions directly contribute to achieving enrollment goals.

¹ "Recruiting and Admissions for the 21st Century Student," SunGard Higher Education, December 2007

² <http://www.google.com/search?q=college+university+strategic+plan&ie=utf-8&oe=utf-8&aq=t&rls=org.mozilla:en-US:official&client=firefox-a>, Retrieved August 29, 2008.

³ Niven, Paul. "Balanced Scorecard for Government and Non-Profit Agencies," 2003

Unmotivated People

People have little incentive to focus on the plan. Annualized reviews and infrequent feedback provide negligible inducements to change behavior. At one institution, enrollment counselors are given reports at the end of the enrollment cycle to show how their territories performed. While these have some value, after-the-fact measurement provides little direction for improving performance.

Unfocused Management

Managers spend more time “working in the enrollment business” versus “working on the business of enrollment.” Constant firefighting and juggling conflicting institutional priorities can sap the ability of the even the most senior professionals to manage strategically.

Disconnected Resource Allocation

Understanding, and efficiently allocating, the resources required to actually implement an enrollment plan can easily get lost. Looking at the previous fiscal year’s budget and adding or subtracting a few percentage points is a common, but not very effective, practice at most institutions.

While many higher education presidents and boards articulate compelling visions for the future—of which enrollment most often is a supporting driver—those visions are seldom translated in a way that helps institutional stakeholders take action.

OVERCOMING THE BARRIERS TO ENROLLMENT STRATEGY EXECUTION: THE RECRUITMENT AND OUTREACH SCORECARD

A recruitment and outreach scorecard⁴ is a carefully selected set of quantifiable measures derived from your enrollment strategy. Scorecards are a powerful tool for leaders to manage performance against strategy.

Carefully selected measures help staff and other internal (or external) stakeholders understand the expected outcomes and performance drivers necessary to achieve your enrollment objectives. The value of the recruitment and outreach scorecard is threefold:

The Recruitment and Outreach Scorecard as a Communication System

Lack of commitment by staff and stakeholders is one of the four common barriers to strategy execution. The scorecard approach allows your institution to communicate its vision and enrollment goals more effectively by capturing its unique enrollment strategy in a framework that articulates clear objectives and performance indicators.

The Recruitment and Outreach Scorecard as a Measurement System

Commonly used enrollment outcome metrics such as inquiries received, or even conversion and yield rates, are not providing leading performance insight. The recruitment and outreach scorecard balances leading and lagging indicators, as well as tangible and intangible outcomes (see figure 1).

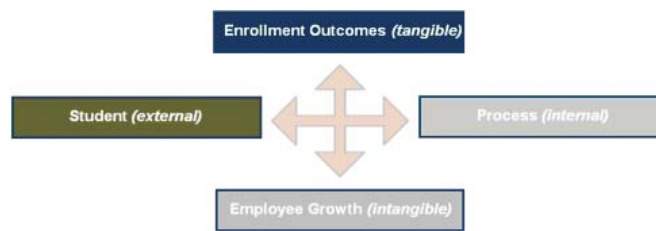


Figure 1

'Balancing' Performance Perspectives

⁴ The Recruitment and Outreach Scorecard concept is adapted from the groundbreaking work of Kaplan and Norton. In 1997, Harvard Business Review named the Balanced Scorecard framework as one of the 75 most influential ideas of the 20th century.

The Recruitment and Outreach Scorecard as a Strategic Management System

As a strategic management system, the scorecard alleviates many of the issues associated with strategy execution. By translating recruitment strategy into a common set of objectives, key performance indicators, targets, and initiatives, a scorecard can be an effective mechanism to spur enrollment managers to spend more time on strategic issues.

Any effective strategy must contain descriptions of desired outcomes, students served, processes to be mastered, and the people responsible for making your strategy a reality. Because the scorecard presents assessment measures associated with your enrollment strategy, it can focus the organization on its strategic enrollment objectives—providing a better picture of the relationship between strategy and execution.

Unlike a dashboard, which is a collection of metrics that represent point-in-time measurements such as the number of applications, registrations, or deposits received to date, the recruitment and outreach scorecard assesses progress in the context of your enrollment strategy—measuring expected outcomes versus actual results. Because it distills this information in a way that everyone across your institution can see, the scorecard serves as a tool for strategy-centered, progressive discussions about enrollment results.⁵

SCORECARDS START WITH STRATEGY

At the heart of the recruitment and outreach scorecard is strategy—the broad priorities adopted by an institution in recognition of its operating environment and in pursuit of its mission.⁶ The scorecarding process begins with identifying the mission and vision of the enrollment function, followed by stated goals.

The use of an enrollment strategy map is a typical tool in this process (see figure 2). When people who are key to executing strategy don't understand how their day-to-day role contributes to strategy execution, overall performance is likely to suffer. Strategy maps are one way to shore up communication with a visual representation of your strategy, making it easier to communicate and drive organizational alignment.

Strategy map development is a forcing function that drives an enrollment office to first reach a consensus on its strategy and related objectives.

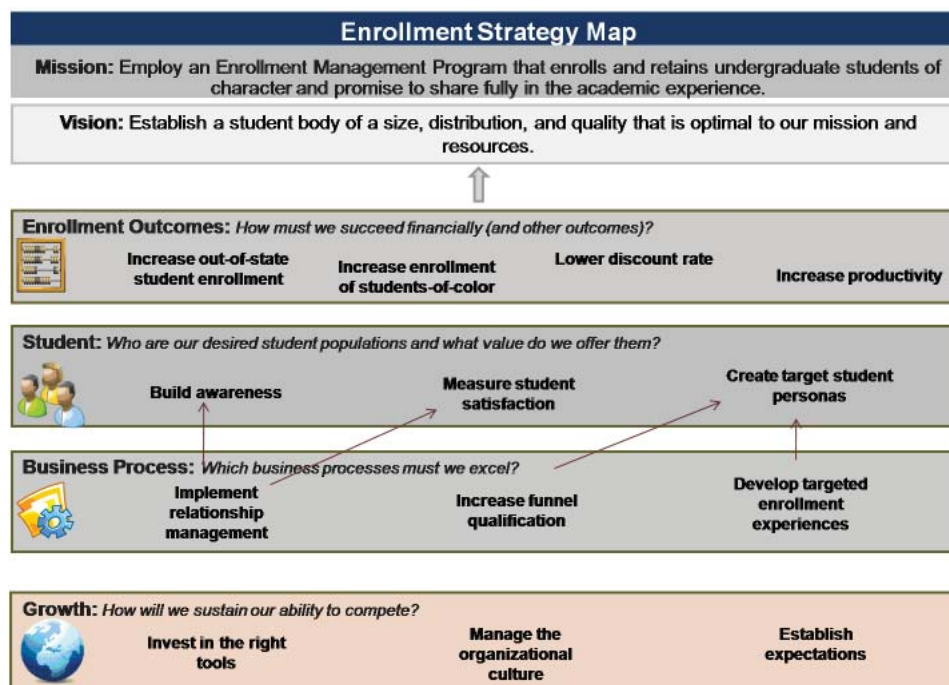


Figure 2
Mapping Enrollment Strategy

⁵ Niven, Paul. *Balanced Scorecard: Maximizing Performance and Maintaining Results*. 2006.

⁶ Adapted from Niven.

KEY PERFORMANCE INDICATORS, TARGETS, AND TOLERANCES

Once you achieve consensus around strategy, you can identify key performance indicators, desired targets, and tolerance amounts. Key performance indicators (KPI) represent the measures that drive desired objectives and goals. As the lighthouse provided direction to early sailors, the KPI target is a fixed point of reference by which to navigate using decisions, actions, and the allocation of resources. Within the context of acceptable tolerances, KPI targets are assigned to track actual results (see figure 3).

For example, if the objective is to enroll 800 students for the winter semester and yet deposits are down 100 from last year, your vice president of enrollment would benefit from a real-time, early warning while there is an opportunity to take corrective action.

Actual	Target	Variance	Variance %	Tolerance	KPI Score
700	800	100	-13%	5%	2.6

Figure 3
Early Enrollment Warning Alert

In Figure 3, the institution's tolerance level is 5% for enrollment deposits from students enrolling in the winter semester. For every tolerance unit away from the target, the score is 1. The variance of 13 is divided by the tolerance unit of 5 yielding a KPI score of 2.6. Because this is a "neutral-from-the-center" score, the enrollment deposit KPI that is above or below 2 tolerance units needs action.

Research suggests that comparing results against a predetermined target provides context while the process of target setting increases performance by an average of 16 percent.⁷

INITIATIVES

Initiatives are the specific activities or actions you will employ to achieve KPI targets. Initiatives can vary greatly in scope and range from a new institutional branding campaign to the launch of a student advising center. When it comes to developing an actionable enrollment plan, initiatives are rarely in short supply. The key is in choosing the right initiatives that positively move the performance needles within your scorecard.

Surprisingly, while most colleges and universities have institutional strategic plans, many lack written recruitment plans that articulate clear goals, measurable objectives, and that identify specific supporting initiatives. Without this level of transparency, building support and institutional understanding of your enrollment plan may be difficult at best. In other words, a 'trust us' approach is no longer sufficient.

AUTOMATING THE SCORECARD

After carefully and clearly identifying your enrollment goals, objectives, supporting KPIs, targets, and initiatives, a recruitment and outreach scorecard may be developed and maintained with limited or no automation. But, ultimately for the scorecard to have real utility as an enrollment management business tool, automation will almost always be required (see figure 4). Automating your scorecard provides a number of benefits including:

Transparency

Automating your scorecard provides a new level of transparency to the strategic drivers and progress toward goals. The scorecard tells your enrollment strategy story through selected indicators and initiatives increasing the opportunity for institutional buy-in and support.

⁷ Locke, Edwin. "Motivation by Goal Setting," Harvard Business Review, November 2001.

Disseminating Information

Information sharing is enhanced by software's ability to provide hyperlinks, allowing users to easily connect goals, objectives, and key performance indicators. Managers are alerted when performance indicators trend away from desired targets, prompting quick actions to change course.

Minimize Errors and Reduce Costs of Updating and Production

Multiple data sources, spreadsheets, and reporting processes add the risk of error. As a dynamic tool, many software solutions enable presentation of scorecards via graphical, web-based interfaces, drawing data from a number of sources and enabling access by any authorized user from any internet-connected device.

Incorporating Analytics

The real power of the recruitment and outreach scorecard is unlocked when analytics are used to determine cause and effect, to track trends, and to enable additional types of analysis. For example, for many metrics it's not only important to know where things are at a particular point in time but how they are trending. Since scorecards contain linked cause and effect metrics, the ability to drill down into a poorly performing metric can often aid in understanding why it is performing poorly and suggest insights into how it may be corrected.⁸

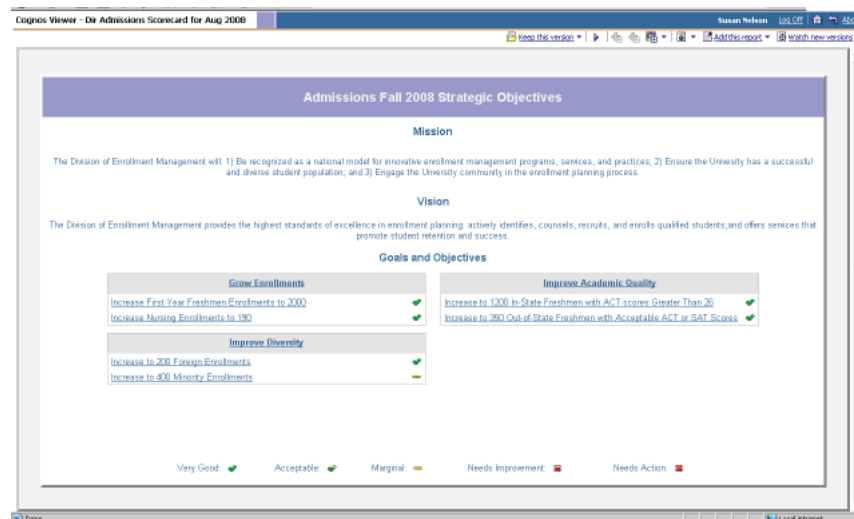


Figure 4
Automating the Recruiting and Outreach Scorecard

⁸ Simons, Craig. "Automating the Balanced Scorecard," Forrester Research. December 2004.

A PATH TO SCORECARD SUCCESS

Given today's challenging enrollment environment, the recruitment and outreach scorecard may be a useful tool to align the organization, communicate your strategy, and manage strategically.

The scorecard concept is sometimes referred to as deceptively simple. While the concept is intuitive, the process is far from simplistic. Having the ability to measure individual contributions to an overall enrollment strategy is simple in theory, but in practice is something else entirely when you consider the perceived impact on people. A scorecarding process begins with a written enrollment plan with clear goals. This is followed by the essentials: executive sponsorship, a guiding rationale, and the thoughtful selection of the scorecard project team. Don't underestimate the people part of the process. As with any major initiative, organizational and cultural issues, and how you manage them, can separate scorecard winners from losers.

Finally, a scorecard is an iterative process and a new approach to strategic enrollment management. Past assumptions about what drives enrollment results will be called into question as measures are applied. The scorecard allows managers to test performance hypothesis and react in real time. It's not something that you will do once, put into a binder, and file. Treating your scorecard as a dynamic, learning device will give you the confidence to plan your enrollment strategy and connect action with results.

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