

## PROJECT CHARTER

**Project Team: Strategic Enrollment Management**

**Project Type: Planning**

**Project Duration: Spring 2019-Spring 2020**

**Sponsoring Council: Student Success Council**

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### PROJECT BACKGROUND AND NEED (Why is the project necessary?)

American River College (ARC) does not have an existing enrollment management plan or clearly articulated enrollment targets. Like many other districts across the state, Los Rios has experienced an overall enrollment decline in recent years. However, ARC has realized growth in certain segments such as online education and apprenticeship.

The college is in the midst of multiple changes that could impact future enrollments. First, the implementation of guided pathways is expected to result in better outcomes for students, but will also change course taking patterns. Second, the college has joined the Online Education Initiative (OEI) and is developing a more extensive presence for its Virtual Education Center. Finally, the college is implementing various technologies which can support enrollment management (e.g., ELSS and SEL), but has not had the opportunity to intentionally consider how these technologies might be leveraged to support a cohesive strategic enrollment management strategy.

In order to bring various efforts together, ARC needs a strategic enrollment management (SEM) plan that holistically addresses enrollment management across the institution. The SEM plan would serve as a reference on the current state of ARC's enrollment activities and supply an actionable implementation structure for the recruitment, enrollment, and retention strategies that are necessary to achieve and maintain optimum enrollment levels in support of the college mission.

According to the Institutional Effectiveness Partnership Initiative (IEPI), the operational definition of SEM for the California Community Colleges is:

*“Within California Community Colleges, SEM is a shared responsibility. Student success is central to all related planning, practices, and processes. The purpose of SEM is to:*

- *Establish comprehensive student enrollment goals that are aligned with the college's mission and strategic plan.*
- *Promote student success by improving access, engagement, persistence, and completion.*
- *Ensure fiscal stability and viability by optimizing enrollments and integrating SEM into the college financial planning, budgeting, and allocation processes.*
- *Offer quality and relevant programs with clear educational pathways, course offerings, and appropriate student support.*
- *Implement strategies that lead to equitable access and outcomes.*
- *Create a data-rich environment to inform decisions and evaluate strategies.*
- *Design and implement communications and marketing with internal and external stakeholders to increase understanding of SEM and to meet SEM goals.*
- *Increase collaboration among departments across the campus to support the enrollment program.”*

Source: <https://visionresourcecenter.cccco.edu/ask/topic/sem/sem-operational-definition>

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### PROJECT PURPOSE AND SCOPE (What is the project expected to encompass? What are the boundaries?)

This project would develop a SEM plan that assesses existing enrollment management practices and is intended to cultivate optimum enrollment levels in alignment with the college's mission and strategic plan. The planning process would utilize strategic enrollment management methodology to holistically align efforts across all stages of the student life cycle to simultaneously foster student success. It may recommend approaches, propose implementation timelines, or suggest next steps. Plans of this type typically explore topics such as:

- Historical, projected, and optimal enrollment levels (targets)
- College image and brand
- Marketing and communication efforts
- Existing and potential enrollment streams
- Recruitment and outreach efforts
- Admission and front-door services
- Affordability and financial assistance efforts
- Program and service offerings
- Competitors and competitive advantage
- Partners and transition points (K-12, higher education, and employer)
- Enrollment policies, practices and procedures
- Student retention and completion
- Technologies which support enrollment and enrollment management
- Training and professional development
- Guiding principles and common definitions related to enrollment management
- Research and communication of information relating to strategic enrollment management
- Strategic enrollment management through the lens of equity and social justice

The charge of the project team is limited to the planning process including steps such as assessment, analysis, strategy design, and developing a written planning document. Actual implementation of a strategic enrollment management plan is beyond the scope of work.

### PROJECT OBJECTIVES (What is the project expected to achieve?)

Successful completion of this project is intended to achieve the following objectives:

- 1) Gather resources to inform the planning process such as existing data on ARC enrollments and enrollment management efforts, promising practices from other institutions, existing regulations and CCCCO materials (e.g., new funding formula), and other relevant research
- 2) Assess the current state of ARC enrollment management practices and efforts
- 3) Establish clear enrollment targets (goals) through 2025
- 4) Using what is learned through assessment and gathered resources, define a SEM strategy that:
  - a. focuses on student success across the entire life cycle while also providing a viable means of achieving the established enrollment targets
  - b. coordinates efforts across the institution and creates synergy to promote effective enrollment management at every stage (outreach, admission/onboarding, enrollment, retention, completion)
- 5) Develop a draft strategic enrollment management plan that covers the period of 2020-2025\*

*\*Integrated planning calendar indicates timeline of 2019-2031; start year has been adjusted to 2020 due to delayed start of planning process*

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### PROJECT DELIVERABLES (What items will be produced during the project?)

Deliverables to be completed and/or submitted for approval:

- 1) Draft Strategic Enrollment Management Plan (2020-2025\*) which includes, but is not limited to:
  - a. Brief assessment of current state
  - b. Clear enrollment targets (goals) through 2025
  - c. Enrollment management strategy that is designed to achieve the targets and that is aligned to the college mission and strategic plan; at minimum, the strategy should address:
    - i. Prospective student outreach, recruitment, and admission
    - ii. New student onboarding
    - iii. Financial aid and registration
    - iv. Course offerings and pathways
    - v. Academic and employment needs of the community
    - vi. Engagement, retention, and student support through goal completion
    - vii. Marketing and communication
    - viii. Technological tools
    - ix. Fiscal considerations (relationship of enrollment to revenue, budget, allocations)
    - x. District strategic plan goals
  - d. Scheduling development process that is a coordinated, shared institutional responsibility
  - e. Scheduling management guidelines
  - f. Recommended activities and timelines designed to work towards implementing the strategy
  - g. Anticipated costs and resource needs
  - h. Potential funding mechanisms, partnerships, or support recommendations

*\*Integrated planning calendar indicates timeline of 2019-2025; start year has been adjusted to 2020 due to delayed start*

### SUCCESS INDICATORS (How will success be measured or determined?)

The project will be considered successful when:

- 1) An assessment of current enrollment management efforts has been completed
- 2) A strategy for future enrollment management across the student lifecycle has been developed that is grounded in strategic enrollment management (SEM) principles
- 3) A draft strategic enrollment management plan is proposed and considered through established governance channels
- 4) The adopted plan is available to serve as a roadmap for college-wide enrollment management efforts
- 5) A coordinated scheduling process is produced

All of these indicators can be thoroughly accomplished through completion of the stated project objectives.

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### PROJECT ASSUMPTIONS (What conditions are believed to exist?)

The project team was authorized based on the following assumptions:

- ARC's mission, strategic goals, and commitment to social justice and equity are central to this work.
- Strategic enrollment management requires collaboration across traditional silos and throughout the entire student life cycle. It involves more than academic scheduling and section management.
- It will be necessary to view this project through a multi-faceted lens that considers face-to-face and online components; main campus, virtual, and center locations; various avenues to college access including the working learner and apprenticeship; as well as emerging opportunities. The college must strive for agility in order to quickly adapt to a rapidly changing environment.
- Academic scheduling will reflect a manifestation of the guided pathways work that is based on programs rather than individual courses. Planning should address consistent processes for how academic schedules are built, block scheduling, and cross-discipline coordination.
- The transition to areas of interest/program pathways will require a reallocation of FTE to ensure students are able to get the classes they need to complete pathways in a timely manner.
- Flexible learning options, multiple entry points, and other methods that challenge the status quo should be explored in pursuit of a "Students First" approach that meets students where they are and eliminates institutional barriers to goal completion.
- Outreach, recruitment, engagement, and student retention efforts should also be addressed in a manner that is aligned with the ARC Redesign.
- The project should contend with the issue of scheduling and managing enrollments with incomplete information at critical moments, while also responding to Los Rios productivity goals and enrollment guidance.
- Aligned with ARC's Redesign, the plan may recommend moving away from past practice and reallocating resources in a manner that can holistically foster student success through effective enrollment management.
- The timeline for the plan has been aligned to accreditation cycles and is specified in the draft integrated planning guide as 2019-2025. Future plans would follow a seven-year cycle.
- The content, style, and format of the plan should be concise and accessible to the average person (not written for an academic audience).

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### PROJECT RISKS, CONSTRAINTS, OR DEPENDENCIES (What factors might impact the project? How might the project intersect with the internal or external environment including other projects?)

The project team should be aware of the following known risks, constraints, and/or dependencies:

- The draft plan will need to be aligned to the overarching framework of the Institutional Equity Plan which is currently in progress and is expected to be completed by the end of Spring 2019.
- Educational master planning is also expected to occur in Spring-Fall 2019. Planning for strategic enrollment management should coordinate with the other project to ensure that the final drafts do not conflict.
- This project (as well as future implementation of the plan) is likely to be dependent upon access to timely data through a “data on demand” system that would be easily accessible to the project team and other employees; Platinum Analytics, CCCApply application statistics, student service metrics, retention/completion statistics, and/or other source data may also inform thinking related to enrollment management across the entire student experience
- Coordination with districtwide enrollment management and pathway delivery discussions may be needed.
- In general, Los Rios is experiencing growth in online course enrollments and decline in face-to-face enrollments.
- The move to Guided Pathways may influence course-taking patterns. As a result, historical course enrollment trends may be less predictive of future course enrollment levels.
- The higher education environment and the world of work are both changing extremely rapidly.

### OTHER CONSIDERATIONS (What are the anticipated implications related to equity and inclusion; research and data; district policies and regulations; district and/or college-wide practices; college-wide cross-functional relationships; and resource needs such as staffing, workload, technology, and space/facilities?)

- The funding formula for California Community Colleges is changing, so there may be fluctuations in future revenue trends that cannot be predicted by historical data. There are also strategic considerations on how the goals of the Vision for Success and related funding implications might influence enrollment management activities and supporting institutional practices (e.g., methods to promote AB 540 awareness).
- The team is encouraged to consider potential benefits of working with Los Rios sister colleges in a more coordinated way to leverage the strengths and resources of each college to serve the needs of students
- It is likely that there will be a need for new or redeployed resources to bring the plan to life
- Various implications related to equity and inclusion in response to alignment of the Strategic Enrollment Management Plan to the Institutional Equity Plan

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## PROJECT TIMELINE/KEY MILESTONES

Month(s)	PROJECT PHASE	FOCUS/MAJOR TASKS
March 2019	Initiation	Project initiation and charter development
April-May 2019	Preparation	Project planning; team scheduling; initial research and discovery; preparation for kickoff
May 2019	Team-Based Work	Project kickoff and homework (if determined beneficial by project lead/co-lead)
June-July 2019	Preparation	Additional research and project planning
August-December 2019	Team-Based Work	Conduct assessment and analysis; identify priorities, issues, and/or themes; develop draft plan; initial draft to be completed by late October; team refines draft by suggesting any additional edits and reviews for alignment to the draft Educational Master Plan; final draft completed by <b>mid-December</b>
February-April 2020	Formal Review	Review and adoption of deliverables through governance processes
April 2020	Closure	Celebrate the project team's work and archive artifacts of the project

## Planned Governance Flow of Deliverables

Meeting Date	Council	Desired Outcome
January 23, 2020	Academic Senate	<input checked="" type="checkbox"/> 1 <sup>st</sup> Reading <input type="checkbox"/> 2 <sup>nd</sup> Reading
February 4, 2020*	Student Success Council	<input checked="" type="checkbox"/> 1 <sup>st</sup> Reading <input type="checkbox"/> 2 <sup>nd</sup> Reading
February 13, 2020	Academic Senate	<input type="checkbox"/> 1 <sup>st</sup> Reading <input checked="" type="checkbox"/> 2 <sup>nd</sup> Reading
February 18, 2020*	Student Success Council	<input type="checkbox"/> 1 <sup>st</sup> Reading <input checked="" type="checkbox"/> 2 <sup>nd</sup> Reading - Recommendation to the ELT
March 2, 2020*	Executive Leadership Team	<input checked="" type="checkbox"/> 1 <sup>st</sup> Reading <input type="checkbox"/> 2 <sup>nd</sup> Reading
April 6, 2020*	Executive Leadership Team	<input type="checkbox"/> 1 <sup>st</sup> Reading <input checked="" type="checkbox"/> 2 <sup>nd</sup> Reading

\*Dates above are tentative as the meeting schedule for 2019-20 has not yet been confirmed.

## Standard Description of Project Stages

Project Stages	Description
Initiation	Activities leading to the authorization and chartering of a project team
Preparation	Activities which occur once a team is authorized and can be conducted independently to plan, schedule, and setup the project (project management steps)
Team-Based Work	Activities which occur in a collaborative environment in which the project team works based on the scope of the charter
Formal Review	Activities by which deliverables are submitted to the sponsoring council for formal approval; may involve a sequence of governance review including ELT and/or other entities; formal review may result in acceptance of the deliverables; request for the project team to revisit the design/refinement stages; or abandonment of the project
Closure	Activities to celebrate the success of the project and archive the artifacts of the work completed

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## PROJECT ORGANIZATION, ROLES, AND RESPONSIBILITIES

Role	Responsibilities
<b>Project Leads</b>	<ul style="list-style-type: none"> <li>▪ Prepares, leads, and follows up on meetings (see details of the Role of the Chair in the <i>ARC Governance Framework</i>)</li> <li>▪ Communicates the project to various stakeholders, and when appropriate, solicits feedback on draft deliverables through informal review processes</li> <li>▪ Submits the final deliverables to the sponsoring council for approval</li> </ul>
<b>Project Steward</b>  <i>(may be one of the leads or a separate individual)</i>	<ul style="list-style-type: none"> <li>▪ Manages the project on behalf of the sponsoring council</li> <li>▪ Drafts the charter in consultation with the sponsoring council's chairs</li> <li>▪ Conducts preliminary research to gather information on promising practices, product options, or other relevant materials to inform the project</li> <li>▪ Develops a work plan based on the charter to organize, sequence, and schedule the work of the project team within the available time frame</li> <li>▪ Reports progress to the sponsoring council</li> <li>▪ Maintains and archives project documentation at the conclusion of the project</li> <li>▪ Assists the project leads as needed</li> </ul>
<b>Team Members</b>	<ul style="list-style-type: none"> <li>▪ Participates in all project meetings and activities</li> <li>▪ Supplies valuable knowledge and perspective (often based on the individual's responsibilities or role at ARC)</li> <li>▪ May be assigned specific project tasks to complete outside of project meetings</li> <li>▪ Assists with the "heavy lifting" that is required to accomplish the project deliverables</li> </ul>
<b>External Consultant</b> <i>(optional)</i>	<ul style="list-style-type: none"> <li>▪ Provides expertise and assistance from an external (non-ARC) perspective</li> </ul>
<b>Executive Sponsor</b> <i>(optional)</i>	<p>Large, high-impact projects only:</p> <ul style="list-style-type: none"> <li>▪ Champions the project from the executive level to secure buy-in and ensure viability</li> <li>▪ Communicates project purpose and vision</li> <li>▪ Allocates appropriate resources to support effective development, execution, and institutionalization</li> <li>▪ Maintains awareness of project status and helps mitigate risk</li> <li>▪ Mediates conflicts and facilitates dialogue to resolve project issues</li> <li>▪ Assumes other responsibilities as appropriate based on the project scope</li> </ul>

*Please see Appendix A for a complete roster of the membership for each specified role.*

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## PROJECT STAKEHOLDERS (Who has a vested interest in the project? Who will it impact?)

- Sponsoring Council     Project Team (including leads and members)     Project Steward
- Academic Senate     Associated Student Body     Classified Senate     PES     Management beyond PES
- Instruction     Student Services     Administrative Services
- Specific departments or other entities:

## COMMUNICATION PLAN (How will information be shared with the stakeholders?)

Based on the previously stated stakeholder list, the general plan for sharing project information is as follows:

Communicated By	Audience	Frequency	Purpose
Project Steward	Sponsoring Council	Monthly	Regular update of project status
Forward Motion	College	Monthly	Brief updates on project work

**Note: The communication plan above should contain more items, but needs input from the lead/co-lead.**

### Conflict Resolution

Any matter of significance which cannot be resolved by the project leads may be referred to the appropriate administrator (typically the chair of the sponsoring council) or to the President’s Executive Staff (PES). Any significant change in charter scope will require approval of a revised charter by the Executive Leadership Team (ELT).

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### APPENDIX A: PROJECT MEMBERSHIP

PROJECT TEAM		
	Name of Participant	Role at the College
Project Lead	Kale Braden	AVP, Instruction and Learning Resources
Project Co-Lead	Dyne Effeirtson	Music Faculty
Members	[Institutional Research – Staff TBD]	[Classified professional with research perspective]
	Kevyn Montano	[Classified professional with scheduling expertise]
	Steve Segura	Dean, SRPSTC/McClellan Center
	Marsha Reske	Dean, Virtual Education Center
	Sonia Ortiz-Mercado	Dean, Counseling and Transfer Services
	Jason Ralphs	Supervisor, Enrollment Services
	[Counselor – Faculty TBD]	[Faculty with the counseling perspective]
	Roger Davidson	Dean, Natomas Center
	[Math Dept. Chair or Dean – TBD]	Mathematics perspective
	Doug Herndon	English perspective
	[Science – Faculty TBD]	Science faculty perspective
Note Taker	Kevin Porter	

OTHER ROLES	
Project Steward*	
External Consultant(s)	
Executive Sponsor <i>(high-impact projects only)</i>	

\*May be one of the project leads or a separate individual

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### APPENDIX B: STUDENT PARTICIPATION

The student voice contributes a diverse perspective to ARC project teams and is highly valued. As project teams have widely varied meeting schedules which can require a substantial time commitment, a flexible set of options have been defined to ensure that project dialogue and deliverables are influenced by the student perspective.

Please check one or more boxes below that indicate the methods the project lead/co-lead intend to use to facilitate student participation during this project.

	Method	Description	Compensated?
<input type="checkbox"/>	<b>ASB Appointment</b>	Associated Student Body (ASB) appoints two students to serve on the project team and attend all meetings. <b>This option is considered the standard method of representation.</b>	Yes
<input type="checkbox"/>	<b>Student Resource Panel</b>	In consultation with ASB, create a student resource panel that is called upon by the project lead/co-lead to provide student input at key points during the project. The resource panel may be an existing group of students (e.g., Sages) or a temporarily formed group assigned to the project.	Yes
<input type="checkbox"/>	<b>ASB Direct Involvement</b>	Lead/co-leads work directly with ASB to be placed on an ASB agenda, present the project concept, and solicit input from students during a regularly scheduled ASB meeting.	No
<input type="checkbox"/>	<b>Student Survey or Focus Group</b>	Project conducts a student survey or focus group through the Institutional Research Office and uses the results to inform the work of the project team.	No, but incentives may be provided on a case-by-case basis.
<input type="checkbox"/>	<b>Student Forum or Gallery Walk</b>	Project holds a student forum or gallery walk during which large groups of students can provide input in response to narrative or visual prompts. ASB would be asked to assist in publicizing the date/time of the event to the student constituency.	No
<input type="checkbox"/>	<b>Other</b> (please specify intended methods)	TBD – methods for collecting input from the college as a whole (including students) are yet to be determined	

Please see the “Governance: Student Compensation” document for further details on the compensation structure.