Enrollment Modeling Task Force Charge

Overview: Projections of Penn State student enrollments have typically been developed using different modeling approaches for undergraduates (by Undergraduate Education, mainly by Undergraduate Admissions), graduate students (by the Graduate School), professional degree (by the law and medical schools for their students and the Graduate School and World Campus for all other professional programs), and World Campus students (by World Campus), generally using historical patterns to predict future enrollments. University tuition revenue modeling for the centrally managed component of the budget is done by the University Budget Office, based upon targets established as part of the long-established permanent budget model that was in place through fiscal year 2019-20. World Campus manages the modeling and distribution of revenues (both centrally and to academic units) generated through World Campus programs.

Penn State's planning for a continuation of remote learning in the Summer and Fall 2020 and Spring 2021 Terms due to COVID-19, and the resulting impact on tuition revenues, required a consistent and unified approach to student enrollment projections and management. To address this need, an enrollment projection working group was convened in March 2020 with representatives from Undergraduate Education, the Graduate School, SVP for the Commonwealth Campuses, the University Budget Office, and the Office of Planning, Assessment, and Institutional Research. The working group had to quickly establish new modeling and data gathering processes to inform its enrollment projections. An additional outcome of this work was a recommendation that Penn State develop an ongoing enrollment modeling infrastructure to improve our processes and the consistency of our data and to develop a multi-year enrollment projection strategy that informs academic and budgetary decisions, and robustly supports scenario planning by providing a basis and tools for prediction of the impacts of new models or approaches (e.g., impacts of recommendations from the Tuition Task Force). The work of this Task Force will be a critical component that informs a larger strategic approach to enrollment management at the University, from recruitment through graduation, with an emphasis on access and affordability, retention, timely degree completion, and student success.

Goal: The Enrollment Modeling Task Force will develop robust and comprehensive enrollment modeling methodologies, identify and examine the key issues and opportunities related to Penn State's enrollment planning, modeling, organizational structure, and processes and make recommendations to the Executive Sponsors on practices to be adopted by Penn State:

- Populations to consider
    - Undergraduate, graduate, and professional students
    - Incoming (new admits and transfer) and continuing students
- Data sources
    - Historical enrollments (OPAIR)
    - Admissions data and trends, both internal to Penn State and national/international
    - Other data sources PSU traditionally has not used: e.g., New Student Orientation registration, housing contracts, outstanding student bills, leave of absence requests, impact of new and retired programs, etc.
    - Pennsylvania market share
- Tools
    - What are our current processes for collecting data and how could those be improved?
        - Note: Software should not be seen as the solution but could be considered after our processes have been reviewed
    - Review how World Campus is managing enrollment projections and obtain benchmarking data from peer institutions

As of 3/29/21

- o Survey other units to see if there are other data-driven approaches to project enrollments based on well-honed strategies and planning
- Overall management
  - o Recommend infrastructure to review enrollment projections in an institutional way (i.e., coordinator or committee)

Executive Sponsors:
Renata Engel, Vice Provost for Online Education
Yvonne Gaudelius, Interim Vice President and Dean for Undergraduate Education
Madlyn Hanes, Senior Vice President for Commonwealth Campuses and Executive Chancellor
Nicholas Jones, Executive Vice President and Provost
Lance Kennedy-Phillips, Vice Provost for Planning, Assessment, and Institutional Research
Mary Lou Ortiz, University Budget Officer

Team Leads: Co-chaired by Karen Vance, Associate Vice Provost for Institutional Research, Kelly Austin, Associate Vice President for Administration (Commonwealth Campuses), and Rob Springall, Assistant Vice President for Undergraduate Education & Executive Director of Undergraduate Admissions

Administrative Support: TBD (as determined by the co-chairs)

Team members: Membership will be made up of appropriate representatives from around the University with knowledge, expertise, and history on enrollment management and modeling. The task force will determine if other areas should be represented at specific meetings on an as-needed basis.

Area Represented	Member
Commonwealth Campuses	Kelly Austin
Commonwealth Campuses	Penny Carlson
Enterprise IT	Jen Stedelin
Graduate School	Bill Clark
OPAIR	Karen Vance
Registrar	Bob Kubat
Student Aid	Melissa Kunes
Undergraduate Admissions	Rob Springall
Undergraduate Admissions	Vince Timbers
University Budget Office	Andy Reisinger
World Campus	Clayton Steen
Administrative Support/Recorder	Tracy Claar

Critical Success Factors:
- Meets the criteria and needs of senior leadership and the Board of Trustees
- Coordinates with and supports Penn State's strategic plan (particularly One Penn State 2025) and other University efforts such as the Tuition Task Force
- Benchmarks with other successful universities that are similar in size, complexity, and scope
- Engages important University stakeholders who will be majorly impacted by final recommendation
- Establishes a suitable support network to assist the task force in scheduling, note taking, facilitation, and communication to allow members to focus on the task at hand
- Accelerates pace of deliberation to be responsive to ongoing needs, changing demographics, and potential disruptions (e.g., COVID-19)

Deliverables: Final report with recommendation/s to the Executive Sponsors that includes all business scenarios and a pilot/s implementation plan with recommended units for FY 2021-22.

Timeline:
Official appointment of Task Force – By beginning of March 2021
Task Force Kick-off Meeting – By early April 2021
Benchmarking of enrollment modeling organizational structure and practices – Completed by end of
     May 2021
First draft of recommendations report – Completed by end of June 2021
Second draft of recommendations report – Completed by end of July 2021
Final draft of recommendations completed and submitted – End of August 2021