Planning and Enrollment Management
Strategic Plan Summary

Revised, September 22, 2007

Mission
The Division of Planning and Enrollment Management (PEM) provides information and assistance to prospective, enrolled and former students; faculty, staff, and members of the community-at-large. Services include outreach, admissions, financial aid, class scheduling, registration, graduation evaluations, and student records services. In addition, PEM coordinates strategic planning, performs institutional research, conducts enrollment analysis, and provides statistical reporting for Cal State East Bay.

Values
Planning and Enrollment Management is committed to promoting Cal State East Bay through a supportive environment that ensures convenient, accurate, and timely personal assistance for students pursuing their educational goals.

Context and Alignment with Cal State East Bay’s Strategic Mandates
Planning and Enrollment Management was established in 2007 as a Cabinet-level division, merging the functions in the former Enrollment Services unit with Institutional Research and Assessment, and adding coordination of strategic planning for the university.

As a Division, PEM is responsible for coordinating efforts to achieve Cal State East Bay’s strategic mandate to achieve “strong growth and full enrollment with personalized learning and expanded access.” PEM is also committed to doing its share to make East Bay “an efficient, well-run University with a culture of accountability.” Further, in order to support the academic mission of the University and promote enrollment and student success, PEM has a critical stake in the other five mandates: “a tradition of teaching, learning and academic quality;” “an inclusive campus climate;” “vibrant university villages;” “a quest of distinction realized;” and “a university of choice through regional stewardship.”

Primary Goals and Accountability
PEM’s new and continuing activities can be grouped generally as those that serve students directly, those involved in planning, reporting and assessment, and those involved in providing internal support for the division.
The PEM units involved with planning, reporting and assessment are accountable for timely and accurate aggregate data (historical and current), analysis of trends and patterns, reasonable future projections, and plans responsive to the needs and opportunities of the university. These units have three goals:

- To support strategic planning for CSUEB;
- To sharpen enrollment planning and monitoring; and
- To increase the responsiveness of instructional scheduling and space management to future learning opportunities.

The PEM units that manage administrative processes that serve students directly are responsible for assuring that students and applicants come first, and their needs are addressed with timely, consistent procedures that facilitate student progress and project privacy. Their primary goal is

- To streamline administrative processes, particularly in partnership with other CSUEB divisions.

All managers and directors are responsible for leadership and coordination for the division as a whole, with external organizations on and off campus, and for their particular areas of responsibility within PEM. Internal support units within PEM provide the administrative and technical framework for the others to function effectively. Their goal is

- To enhance organizational capacity in PEM.

The attached conceptual organization chart illustrates the relationship among the different roles and responsibilities of the new division.

The next section discusses each goal briefly, suggesting measures or indicators of achieving that goal and summarizing some of the challenges PEM is addressing to accomplish the goal.

**Strategic Planning**

PEM’s role in strategic planning is to build university capacity, linking academic, physical and resource planning and budgeting. The critical measure for this goal is the extent to which the University can clearly document that it makes resource allocation decisions based on CSUEB’s strategic planning mandates and priorities.

The challenge CSUEB and PEM face in meeting this goal is that the University is just beginning to develop a culture of making resource allocation decisions (budgets, personnel, information technology, and capital projects) based on data and analysis and is faced with short-term needs that might appear to outweigh the long-term value of strategic decisions.

PEM is addressing strategic planning through the divisional strategic planning, WASC reaccreditation review, academic planning task force, and master plan updates for Hayward and Concord.
Enrollment Planning and Monitoring

PEM’s responsibility for enrollment involves developing a fuller understanding of educational needs and opportunities in the region (and in carefully targeted areas beyond our immediate service area) through demographic and market analysis, which can inform a holistic approach to enrollment planning and management that incorporates retention and graduation support as well as recruitment programs. Each unit in PEM strives to maximize enrollment through identification of prospective students (particularly for Outreach) and ensuring that students have timely and accurate information needed to make key decisions at each stage of their academic careers. The primary measure is clear: a net increase in enrollment. In addition, supporting measures align enrollment growth with specific colleges or programs, locations, and student levels. Measures also include yields from recruitment and admissions efforts, retention from year to year, and graduation rates.

Challenges involved include establishing meaningful enrollment targets for specific programs and groups of students and developing a new student data warehouse with sufficient depth and breadth to provide the data PEM and other units need to track activity and make timely decisions to enhance recruitment and enrollment.

To focus on enrollment planning PEM is working with the Provost and academic deans to refine targets. Also, the division is the executive sponsor for the new student data warehouse; and has hired a new assistant vice president for institutional research and assessment, where market analysis is already underway.

Instructional Scheduling and Space Management

On the surface, class scheduling appears to be a relatively straightforward task of matching instructional needs with times and facilities. Thus, the initial measure is space utilization, along with a measure of student and faculty satisfaction with their teaching and learning arrangements.

The scheduling challenges are associated classroom constraints and teaching schedules. In addition, scheduling needs to accommodate emerging knowledge about how students learn and the potential of information technology to support learning. Thus, the scheduling task becomes more sophisticated, and requires innovative approaches to when and how courses meet (virtually as well as in space and time) and how they are supported.

PEM is engaged with these issues through the colleges and academic departments and the Academic Planning Task Force and is working with Facility Planning and the CSU Chancellor’s Office regarding facility standards and reporting procedures that currently lack the flexibility to accommodate creative scheduling.
Administrative Processes

With respect to the operational units, PEM aspires to deliver consistent, reliable, responsive enrollment and student services from recruitment and admissions to advising, mentoring, retention, career development, and beyond – even though some of these services are provided by other CSUEB divisions. The primary measure is *elapsed processing time*, along with student satisfaction.

One key challenge is the coordination involved with numerous “hand-offs” both within PEM and between students, PEM and other divisions such as academic departments, advisers in Academic and Student Affairs, and other providers such as student accounting, freshman orientation, housing, international programs, and open university. Another challenge is that processing requirements are not distributed evenly over the year, so units face concurrent peaks. For example, posting degrees after the end of spring quarter occurs during the same time period as final high school and community college transcripts need review. Similarly, communications staff need to gear up for the next recruitment cycle at the same time as CSUEB is completing the “conversion” of admitted to enrolled students at the end of the summer. Further, the volume of calls and visits is highest at the same time as staff need to be completing critical processes – e.g., just before classes start and during the drop-add period and when financial aid awards are being disbursed.

PEM has started by analyzing work flows and identifying bottlenecks and hand offs. A key asset in this regard is the new student data warehouse which is being designed to provide regular reports that PEM managers can use to monitor work flow. With the implementation of the People Soft student administration system and university web redesign, PEM also aspires to being able to offer all administrative processes on line so that students do not have to visit PEM offices in person to complete any business related to admissions, registration, records, or financial aid.

Organizational Capacity

In order to strengthen its organizational capacity, PEM finds that the division needs to work closely with Administration and Finance and Information Technology Services. As a relatively large division with a range of positions, of which many are in administrative positions with modest salaries, a key measure is *staff turnover* along with related aspects of job performance and satisfaction.

Challenges in this regard include the amount of time it takes to fill vacant positions. Other support needs involve coordination with Administration and Finance regarding accounting, purchasing, and other procedures and with Advancement regarding the design and production of publications.

PEM is undertaking an analysis of staff turnover and will be developing career paths where possible within its support units. With Information Technology Services PEM is sorting out roles and relationships with this other new division.

[Review PEM’s Strategic Planning Matrix]