#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Director, Enrolment Planning and Strategic Analysis

**Job Number:** X-291 | VIP: 1053

**Band:** EXEMPT-9

**Department:** Institutional Planning and Analysis

**Supervisor Title:** Associate Vice President, Finance

**Last Reviewed:**  October 17, 2024

#### **Job Purpose:**

Reporting to the Associate Vice President, Finance, the Director, Enrolment Planning and Strategic Analysis serves as the primary authority for admissions, enrolment tracking, and the development of enrolment projections that underpin the University’s financial and strategic planning processes. As one of the two leaders of the Office of Institutional Planning and Analysis (OIPA), the University’s central hub of institutional data, this role is central to driving institutional strategy, providing expert guidance on key performance metrics, enrolment trends, and funding formula implications that directly influence multi-year budget planning, in-year financial updates, and performance evaluations tied to at-risk funding.

The Director leads the comprehensive analysis and projection of enrolment figures across all student categories, leveraging advanced data modelling techniques and historical trends to create robust, scenario-based forecasts. These projections are critical for ensuring the accuracy of the University’s resource allocation, operating budget planning decisions, and long-term financial stability, and the Director is responsible for decisions regarding methodologies and analytical techniques to ensure the highest levels of possible accuracy in uncertain and constantly changing environments. As the primary strategist for enrolment data, the Director is responsible for integrating institutional data from various departments to provide a unified, accurate, and actionable view of enrolment performance used to inform critical financial decisions.

As a key resource to staff and faculty in fulfilling the vision and mission of the institution, the Director, Enrolment Planning and Strategic Analysis is responsible for the development and communication of data-driven insights to staff and faculty to assist in enabling student success. The Director oversees the creation, interpretation, and evaluation of student retention and success metrics, looking at both the high-level trends as well as the smaller components to assist in targeting areas for improvement. The Director leads the analysis and interpretation of external surveys and communicates findings to internal and external stakeholders to enable staff and faculty to respond quickly and appropriately to the needs of students.

#### Key Activities:

##### Strategic Advice, Planning and Relationship Building

* Advises and supports the President, Provost and other Senior Administration during the negotiation of the University’s Strategic Mandate Agreement, in particular regarding contextual analysis and the development of key performance metrics, enrolment projections, and target setting that may be used by the Ministry of Colleges and Universities (Ministry) to assess at-risk funding.
* Provides strategic enrolment projections and analysis used by Trent Finance and budget developers as key planning assumptions for multi-year budget planning and in-year resource allocation, which are critical for ensuring proper resourcing to fulfill the core mission of the institution.
* Provides expertise and analysis to Trent Finance for budget development and in-year financial reporting regarding the university funding formula.
* Advises Marketing and Recruitment as well as Trent International on the implementation and evaluation of strategies, day-to-day metrics and projections, and the overarching provincial, national and global context.
* Serves as a key representative on Trent’s internal retention committee, providing all relevant data and analysis for both key retention metrics as well as for evaluating in-progress targeted retention initiatives throughout the institution.
* Builds and supports relationships with staff across the institution to ensure information is being used as frequently and as properly as possible in decision making and initiative development.
* Provides expertise to University stakeholders regarding the viability, interpretation and potential use of institutional data in response to external requests.
* Participates in, and provides advice and analysis to, a variety of internal University-wide committees, including the Strategic Enrolment Management Committee.
* Recommends methodologies for the development of internal metrics and advises on limitations of the methodologies used.
* Develops and maintains contacts at the Ministry of Colleges and Universities to help support various interactions in relation to on-going funding initiatives.
* Builds relationships with staff across Ontario Universities for information sharing and discussion around best practices.

##### Admissions and Enrolment Tracking, Analysis and Forecasting

* Collaborates with the Strategic Enrolment Management team, the Enrolment Modeling Working Group, and Trent Finance to develop and update the multi-year enrolment projections for budget planning and decision making. Leads discussions with various groups on enrolment planning methodologies and assumptions.
* Determines, tests and validates multiple methodologies across various enrolment models (undergraduate domestic/international, graduate, post-graduate certificates) used simultaneously to create the enrolment forecast.
* Works closely with the Assistant Director, Budget and Reporting to forecast operating grant and tuition revenue based on the enrolment forecast, as well as various other inputs for the operating budget.
* Develops, produces and interprets a variety of student retention metrics, and advises how these impact overall multi-year enrolment forecasts, in-year estimates, and the corresponding budgetary impacts.
* Continually revises and updates planning assumptions as new data becomes available, and communicates how changes may impact areas across the institution. Such in-year changes to enrolment projections are used for on-going decision making as well as making adjustments the Financial Update reported to the Board and its committees on a regular basis.

##### Institutional Reporting, Interpretation and Analysis

* Accesses and manipulates large and diverse electronic data sets for the purpose of creating reports and responding to requests for information.
* Analyzes and interprets data and reports relating to a broad range of activities within the organization.
* Works with requesters of information to understand data needs and develop timely, reliable, unbiased, consistent and accurate responses that are accurate to the request and give the most useful possible information.
* Makes decisions surrounding proper data inputs and methodologies to provide the most relevant information and potential limitations of the data to requesters.
* Assists in the development of reporting streams and frameworks that assist the organization in closely monitoring its core activities and achievement of its strategic goals, including the key performance metrics established in the Strategic Mandate Agreement used by the Ministry to assess at-risk funding.
* Responds to ad-hoc internal data requests for use in institutional planning, evaluation, operational improvements, predictive analysis and decision making.
* Analyzes data and prepares reports for external agencies including the Ministry and the Council of Ontario Universities (COU). Such reports may be used to assess performance, compliance, funding recovery or for purposes of comparing against other similar institutions.
* Coordinates the integration and use of datasets collected and housed by various operational arms of the University to create a centralized “hub” for institutional information used in decision making.
* Works with and assists data analysts of other departments to ensure the data integrity and quality (accuracy, relevance, reliability, consistency, completeness, timeliness, etc) of institutional information used for decision making across the University.
* Assists and educates owners of data and information in improving data quality, understanding and usability institution-wide.
* Prepares accurate, professional reports that clearly communicate information to intended users at all levels of the organization, and interprets them for use in decision making.

##### Government Reporting, Funding and Policy Analysis

* Coordinates and completes Ministry-mandated reporting such as Annual Report Backs on performance and accountability metrics and compliance reports.
* Proactively monitors the external environment to support planning and decision-making including developments in government funding and higher education research.
* Represents Trent University at the Council of Ontario University’s Canadian University Planning Association (CUPA) committee and any of its relevant subcommittees when deemed necessary.
* Verifies the accuracy of funding allocations.

##### Survey Analysis

* Coordinates or assists with administration of external surveys including Canadian University Survey Consortium (CUSC), National Survey of Student Engagement (NSSE), Canadian Graduate and Professional Student Survey (CGPSS) and Ontario University Graduate Survey (OUGS).
* Prepares analysis and interpretation of external surveys for presentation and communication to both internal and external audiences.
* Updates relevant funding metrics as survey data becomes available.
* Provides advice, analytical expertise and support to other departments engaged in the development, implementation, administration and interpretation of student and other surveys.

##### Resource and Data Management

* In collaboration with the Director, Reporting Systems and Analytics, responsible and accountable for developing and managing the Institutional Planning and Analysis work plan to ensure that all routine projects and functions can be completed accurately and in a timely fashion, while also accommodating daily requests and issues.
* Oversees the collection, analysis and reporting of data necessary for institutional policy analysis, strategic planning and decision making.
* Manages, and where possible makes improvements to, the process of coordinating and responding to internal data requests for use in institutional planning, evaluation, operational improvements, predictive analysis, and decision making.
* Coordinates and responds to external data requests from government agencies and other associations.

##### Leadership, Supervision and Mentoring

* Manages and mentors OIPA staff members, including direct reports, providing guidance, training, and assistance where necessary.
* Organizes and assigns regular duties and special projects, assists in the timely completion of job activities, and oversees the daily activity of the team.
* Leads the hiring and performance management of direct reports.
* Provides guidance and advice on challenging issues.
* Promotes effective employee relations and encourages service excellence and productivity.
* Ensures work quality of staff.
* Contributes to a work environment that fosters and recognizes supportive mentorship, professional quality, continuous improvement, collaboration, and customer-centric culture within OIPA.
* Promotes opportunities for training and professional development through goal setting and support.
* Provides supervision and guidance for staff in other areas of the institution working with data for analysis and dissemination.

#### Education Required:

* Honours University Degree (4 years) in a field with a strong business, research or analytical foundation.
* Masters degree in a business, analytical or policy field required.
* Certification or credentials in data analysis, applied modelling or institutional research would be desirable.
* Requires extensive knowledge with new developments, research techniques and applied modelling methods which may exceed the scope of basic university education.

#### Experience/Qualifications Required:

* A minimum of ten (10) years’ experience in an Institutional Research or analytical environment, preferably in a post-secondary education environment, and related professional or managerial experience.
* Ten (10) years of experience with descriptive and inferential statistics, longitudinal data analysis, survey design and administration, report generation and dissemination.
* Demonstrated ability to transform complex datasets and analysis into understandable and actionable information for decision making.
* Ability to work both independently and collaboratively in a confidential and ethical manner.
* Advanced skill and knowledge relating to spreadsheet and analytical software.
* Excellent interpersonal, written and verbal communication skills.
* Strong organizational, time management and problem-solving skills.
* Ability to work under pressure and cope with competing demands.
* Experience with government agency reporting.
* Demonstrated knowledge of the Ontario post-secondary system and how it is funded.

**Job Evaluation Factors:**

##### Analytical Reasoning

Work requires extremely complex analysis, reasoning and judgement to solve a broad range of diverse and challenging problems. Situations are broad in scope and lack standard practice to resolve, thus requiring the recognition, analysis and creative definition of practical solutions. Highly developed logical and critical thinking skills are required to define problems, determine meaningful methodologies, develop alternatives, propose, plan and implement solutions. Requests and requirements are often connected and work requires an understanding of how each piece fits together to ensure the most applicable information is used, to ensure consistency across requests, and to be able to explain differences caused by varying requirements. Requestors may not always understand the nature of the data available nor the best way to pose a research/data question, requiring expertise in the available data and an ability to understand the broader context in which questions are asked in order to guide discussions or projects to the best possible solutions. Failure to appropriately respond to these questions or advise staff across the institution can significantly affect the organization’s fulfillment of its vision and mission through incorrect use of resources or policy implementation.

Examples:

* Enrolment forecasts underpin the operating budget of the University, are developed without the existence of any established industry best practices, and are subject to a multitude of internal and external factors in an ever-changing environment. Complex methodologies must be established, tested, validated and understood to provide accurate estimates using available information and educated assumptions. Limitations to the estimates and methodologies used must be clearly communicated to decision makers. Overall enrolment forecasts must also be translated into accurate financial data to ensure the highest quality information for the development of the operating budget and resource allocation decisions. Failure to produce quality forecasts carry a long-term impact to the organization through the resulting budget process.
* The Director, Enrolment Planning and Strategic Analysis will need to meet with senior management, interpret their data needs and decide how to best provide the information so they can make appropriate decisions. This involves an understanding of the available data along with any caveats, the ability to access and manipulate the data into useable information, and the ability to disseminate that information in a timely and accessible manner for understanding and appropriate use in decision making.

##### Decision Making

The Director, Enrolment Planning and Strategic Analysis is expected to operate at a highly independent level and is directly responsible for the collection, analysis and dissemination of information used for planning purposes and decision making throughout the institution, as well as mandated external reporting exercises.

The Director, Enrolment Planning and Strategic Analysis is required to make decisions with little input from others and limited supervision, must determine the best methodology to use for answering questions that often have never been asked in the past, and will collaborate/negotiate with colleagues and stakeholders to properly define the parameters of an analysis where experience, discretion and judgement are required.

In collaboration with the Director, Reporting Systems and Analytics, the Director, Enrolment Planning and Strategic Analysis must manage the workflow of the Office of Institutional Planning and Analysis, and is responsible for the products produced within the office as well as tasked with ensuring that they are used properly and effectively for decision-making throughout the University.

Example:

* Enrolment estimates involve a variety of methodological questions where decisions are made without supervision, including timeframes for historical averages or treatment of areas with little to no historical data. Other decisions must be made through collaboration and negotiation, such as agreeing on intake targets with the Enrolment Modeling Working Group.

##### Impact

Impact on the organization is significant and long term. Errors that go undetected may affect recommendations, decisions or actions, leading to a negative impact to the whole organization. Areas of potential impact may include the organization’s reputation and financial stability. Incorrect information could result in reduced enrolment and retention, which can further impact the operating budget. Failure to provide accurate in-year forecasts can result in improper resource allocation, which can lead to overspending and requiring future cuts or under-resourcing and being unable to properly serve students. Ultimately, there is a significant reputational and financial risk to the institution if the Director, Enrolment Planning and Strategic Analysis is not strategic and effective in leadership, decision making and analysis.

Examples:

* Negotiations throughout the development of the Strategic Mandate Agreement require an understanding of the available metrics, the interplay between them, and the context through which they may shift from both internal and external changes. Failure to properly assess and contextualize these issues can result in the loss of government funding if targets are not met.
* Application/Enrolment tracking and projections are used as the basis for budgeting and planning across the institution, and potential errors are magnified by advanced budget timing requiring estimates be developed prior to official enrolment counts in the Fall. Errors in projection methodology and/or failure to properly track and account for changing circumstances as new data becomes available can exacerbate any potential issues in staffing or resource allocation and may lead to deficits if decisions are made based on erroneous projections.

##### Communication

Communication requires consulting on issues, determining requirements, presenting complex information, explaining analysis and rationale and making recommendations to senior management, faculty and staff. The ability to present and defend information and analyses which may be unpopular or unfavourable is essential for evidence-based decision making, and persuasion, conciliation, or negotiation skills are frequently required when dealing with complex situations. Job responsibilities require communication with diverse contacts, inside and outside the organization. Relationship building is essential at all levels of the institution as well as with external contacts and agencies.

Internal:

* Job requires contact with President, Provost and Vice Presidents, Associate Vice Presidents, University Registrar, Directors, Deans, Associate Deans, Chairs, Faculty, Managers, Administration Staff, Information Technology Staff, Students and Committees.

External:

* Job requires contact with external auditors, MCU, COU, media and other post-secondary institutions.

##### Motor/ Sensory Skills

There is a requirement for a high level of precision in motor or sensory skills with some tolerance level. Job duties include keyboarding throughout the day and require dexterity involving attention to detail and accuracy.

* Keyboarding - a lot of time spent on the computer, using keyboard skills.
* Attention to detail and accuracy required.
* Hearing/Verbal - communicate effectively with internal and external audiences.

##### Effort

Work involves a high level of mental effort. Work may require keyboarding for extended periods of time and long periods of sustained concentration, with multiple competing demands, changing deadlines and time pressures, frequent interruptions and distractions over which the job has some control.

Mental:

* Sustained concentration - ability to maintain concentration on projects to ensure their completion in an accurate and timely manner.
* Multitasking/competing demands - ability to manage multiple and diverse projects with competing timelines; ability to adapt schedule for new priorities

##### Working Conditions

Physical:

* Sitting - prolonged sitting at desk
* Computer use - repeated movements with mouse and keyboard

Psychological:

* Changing deadlines and time pressures as new issues and requests arise
* Providing information that may be unpopular and cause frustration or anger
* Stress related to the institutional dependence on data to make decisions that affect funding, enrolment and institutional reputation.