**Department of Human Resources**

**Exempt Job Description**

**Job Title:**  Information Manager, Enrolment Planning and Strategic Analysis

**Job Number:**  X-291

**Band:**  7

**NOC:**  0213

**Department:**  Institutional Planning and Analysis

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

**Last Reviewed:** May 25, 2018

**Job Purpose**

Reporting to the Associate Vice President, Finance and working in collaboration with the Information Manager, Reporting Systems and Analytics, the Information Manager, Enrolment Planning and Strategic Analysis engages in the transformation of institutional and market data into actionable information to be used for operational and strategic planning, decision making, assessment, evaluation and reporting. Responsible for admissions, enrolment and performance tracking and projections, the Information Manager, Enrolment Planning and Strategic Analysis provides strategic advice and expertise regarding key performance metrics, enrolment projections and funding formula implications used for multi-year budget planning, in-year financial updates, and performance assessment related to at-risk funding. The Information Manager, Enrolment Planning and Strategic Analysis plays a key role in the coordination, integration and use of disparate datasets collected and housed within various operational arms of the institution. The Information Manager, Enrolment Planning and Strategic Analysis serves as a steward of institutional data and provides backup and support to the Information Manager, Reporting Systems and Analytics.

**Key Activities**

***Strategic Advice and Planning***

1. Advise and support 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 to assess at-risk funding.
2. Provide strategic enrolment projections and analysis used by Finance and budget developers as key planning assumptions in the multi-year budget planning.
3. Provide expertise and analysis to Finance for budget development and in-year financial reporting regarding the university funding formula.
4. Advise Marketing and Recruitment on the implementation and evaluation of strategies, day-to-day metrics and projections, and the overarching provincial context.
5. Support various interactions with government in relation to on-going funding initiatives.
6. Provide expertise to University stakeholders regarding the viability and potential use of institutional data in response to external requests.
7. Participate in, and provide advice and analysis to, a variety of internal University-wide committees, including the Strategic Enrolment Committee.
8. Recommend methodologies for the development of internal metrics.

***Admissions and Enrolment Tracking, Analysis and Forecasting***

1. Collaborate with the Strategic Enrolment Management team and Finance to develop and update the multi-year enrolment projections.
2. Determine the appropriate methodology for creating the enrolment forecast.
3. Forecast operating grant and tuition revenue based on the enrolment forecast.
4. Contribute to the development of multi-year enrolment and retention planning.
5. Continually revise and update planning assumptions as new data becomes available, as well as communicate how changes may impact areas across the institution.

***Institutional Reporting and Analysis***

1. Access and manipulate large and diverse electronic data sets for the purpose of creating reports and responding to requests for information.
2. Analyzes and interpret data and reports relating to a broad range of activities within the organization.
3. Work with requesters of information to understand data needs and develop timely, unbiased, consistent and accurate responses.
4. Assist 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.
5. Respond to ad-hoc internal data requests for use in institutional planning, evaluation, operational improvements, predictive analysis and decision making.
6. Analyze data and prepare reports for external agencies including the Ministry of Advanced Education and Skills Development (MAESD) and the Council of Ontario Universities (COU). Such reports may be used to assess performance, compliance or for purposes of comparing against other similar institutions.
7. Coordinate 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.
8. Work with and assist 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.
9. Assist and educate owners of data and information in improving data quality, understanding and usability institution-wide.
10. Prepare accurate, professional reports that clearly communicate information to intended users at all levels of the organization.

***Government Reporting, Funding and Policy Analysis***

1. Coordinate and complete Ministry-mandated reporting such as Tuition Fee Compliance Reports and Annual Report Backs on performance and accountability metrics.
2. Proactively monitor the external environment to support planning and decision making including developments in government funding and higher education research.
3. Represent Trent University at the Council of Ontario University’s Canadian University Planning Association (CUPA) committee and any of its relevant subcommittees.
4. Verify the accuracy of funding allocations.

***Survey Analysis***

1. Coordinate administration of external surveys including CUSC, NSSE, CGPSS and Ontario Graduate Survey.
2. Prepare analysis and interpretation of external surveys for presentation and communication to both internal and external audiences.
3. Update relevant funding metrics as survey data becomes available.
4. Provide 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***

1. In collaboration with the Information Manager, 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.
2. Oversee the collection, analysis and reporting of data necessary for institutional policy analysis, strategic planning and decision making.
3. Manage, and where possible make 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.
4. Coordinate and respond to external data requests from government agencies and other associations.

**Analytical Reasoning**

* Work requires complex analysis and highly developed reasoning skills to solve a broad range of diverse and complex problems.
* Situations are broad in scope and lack standard practice to resolve, thus requiring the recognition, analysis and creative definition of practical solutions.
* Logical and critical thinking is often required to define problems, determine meaningful methodologies, develop alternatives, propose, plan and implement solutions.
* Requests and requirements may be connected and work often 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 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.

Example:

The Information Manager, 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 Information Manager, 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 Information Manager, 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 Information Manager, Reporting Systems and Analytics, the Information Manager, 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.

**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. Incorrect information could result in reduced enrolment and retention. Ultimately, there is a significant reputational and financial risk to the institution if the Information Manager, 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. 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.

**Education Required**

Honours University Degree in a field with a strong business, research or analytical foundation. Masters degree in a business, analytical or policy field preferred.

**Experience Required**

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

**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. 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, MAESD, 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:

* The position involves stress related to the institutional dependence on data to make decisions that affect funding, enrolment and institutional reputation.