

NOW MORE THAN EVER

Mainstreaming Enrolment and financial forecasting in Continuing Education

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Discussion Questions

- Where do enrolment planning and financial planning feel connected in your organization?
- Where do they break down?
- What has been hardest to forecast reliably: demand, pricing, costs, or faculty capacity?
- What resistance or hesitation have you encountered when trying to change how planning happens?

SERVICE DU DÉVELOPPEMENT PROFESSIONNEL

NOW MORE THAN EVER: MAINSTREAMING ENROLMENT
AND FINANCIAL FORECASTING IN CONTINUING
EDUCATION PLANNING



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Original business model of SDP

- non-credit and credit activities, mainly in management.
- The unit was expected to generate new revenue for the institution with a low level of collaboration and very little impact on Faculties.
- Could have offers in competition with the Faculties.
- A model that allowed little opportunity for growth. Faculties do not have access to a sales team and the SDP does not have access to CE products developed by Faculties.



Service du développement professionnel (SDP) business model

- Involved only in non-credit activities
- Hybrid model: central unit that has all the resources required to develop, design, market and deliver continuing education (CE) programs, and offering services tailored to the Faculties' business models
- The SDP's financial target :
 - Generate sufficient own revenue to cover its operating costs with no growth objective for the SDP's own sales
 - Support the growth of institutional sales across all units
- Faculties are not required to work with the SDP but are strongly encouraged to do so and they all contribute financially
- SDP's income represent 30% of the total sales of CE at Université Laval (39% for 2022-2023)

SDP – Business model

income : non-credit by unit					
Unit	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
SDP	2 353 429 \$	3 618 652 \$	4 249 912 \$	3 875 650 \$	3 544 322 \$
Unit 1	13 965 \$		7 358 \$	17 014 \$	11 422 \$
Unit 2	31 794 \$	78 183 \$	51 153 \$	71 079 \$	63 809 \$
Unit 3		16 300 \$	10 500 \$	10 400 \$	
Unit 4	41 528 \$	67 786 \$	59 007 \$	50 353 \$	93 830 \$
Unit 5	351 150 \$	365 153 \$	468 411 \$	485 855 \$	785 361 \$
Unit 6	731 010 \$	523 379 \$	765 242 \$	710 689 \$	928 298 \$
Unit 7	162 562 \$	326 389 \$	153 142 \$	128 355 \$	192 769 \$
Unit 8	79 438 \$	89 494 \$	75 544 \$	50 016 \$	40 168 \$
Unit 9	185 970 \$	164 625 \$	232 704 \$	187 060 \$	256 012 \$
Unit 10	2 485 483 \$	3 101 423 \$	3 599 919 \$	4 792 963 \$	4 189 149 \$
Unit 11	30 475 \$	135 870 \$	218 387 \$	122 364 \$	208 148 \$
Unit 12	245 \$	18 675 \$	14 375 \$	20 000 \$	24 725 \$
Unit 13	678 105 \$	721 871 \$	761 362 \$	880 286 \$	805 104 \$
Unit 14	78 225 \$	88 925 \$	96 625 \$	120 825 \$	134 820 \$
Unit 15	69 590 \$	121 457 \$	217 162 \$	147 677 \$	56 899 \$
Unit 16	16 200 \$	960 \$	1 320 \$	1 320 \$	4 012 \$
Unit 17				950 471 \$	1 587 873 \$
total	7 309 169 \$	9 439 142 \$	10 982 123 \$	12 622 377 \$	12 926 721 \$



Mandate – Continuing Education

- Develop new non-credit CE programs to complement the Faculties' offer
- Phone-in follow up, business developpement (sales), institutional marketing, business/customer service
- Support the Faculties in the development, sale and implementation of affordable non-credit continuing education programs

Source of income

- The institution's annual budget covers approximately 50% of the salaries for staff in SDP's CE division– stable budget indexed annually.
- Sales of its own CE programs (developed, delivered and marketed by SDP)
 - Objective : stable
- Sales and delivery of CE programs developed and offered by Faculties
 - Objective : growth

Evolution of the business model

- The primary objective is to increase future revenue and profitability of Faculties CE programs
- CE products that belong to the SDP are gradually being transmitted to the Faculties
- SDP must still be able to support the Faculties for any steps, excluding content expertise (design, sales, distribution, business/customer service)

Responsibilities chart

SDP	Shared responsibility	Faculty
<ul style="list-style-type: none">- Solicitation/sales- Responding to calls of interest- Submission of Business proposals- Customer database management- Delivery logistics- Business and client services- Invoicing and administrative follow-ups	<ul style="list-style-type: none">- Market analysis- Pricing- Marketing	<ul style="list-style-type: none">- Content Experts- Course Design- Design of training activities and paths

Challenges

- Establish a business model with a revenue stream that works for both : SDP and Faculties
- Clarify the roles and responsibilities of SDP and other units and eliminate overlapping responsibilities
- Secure the full cooperation of faculty partners to establish a model based on respect and trust

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Now more than ever: Mainstreaming enrolment and financial forecasting in Continuing Education planning



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Overview

- Searching for One Story
- Integrating Multiple Models
- Aligning with McGill

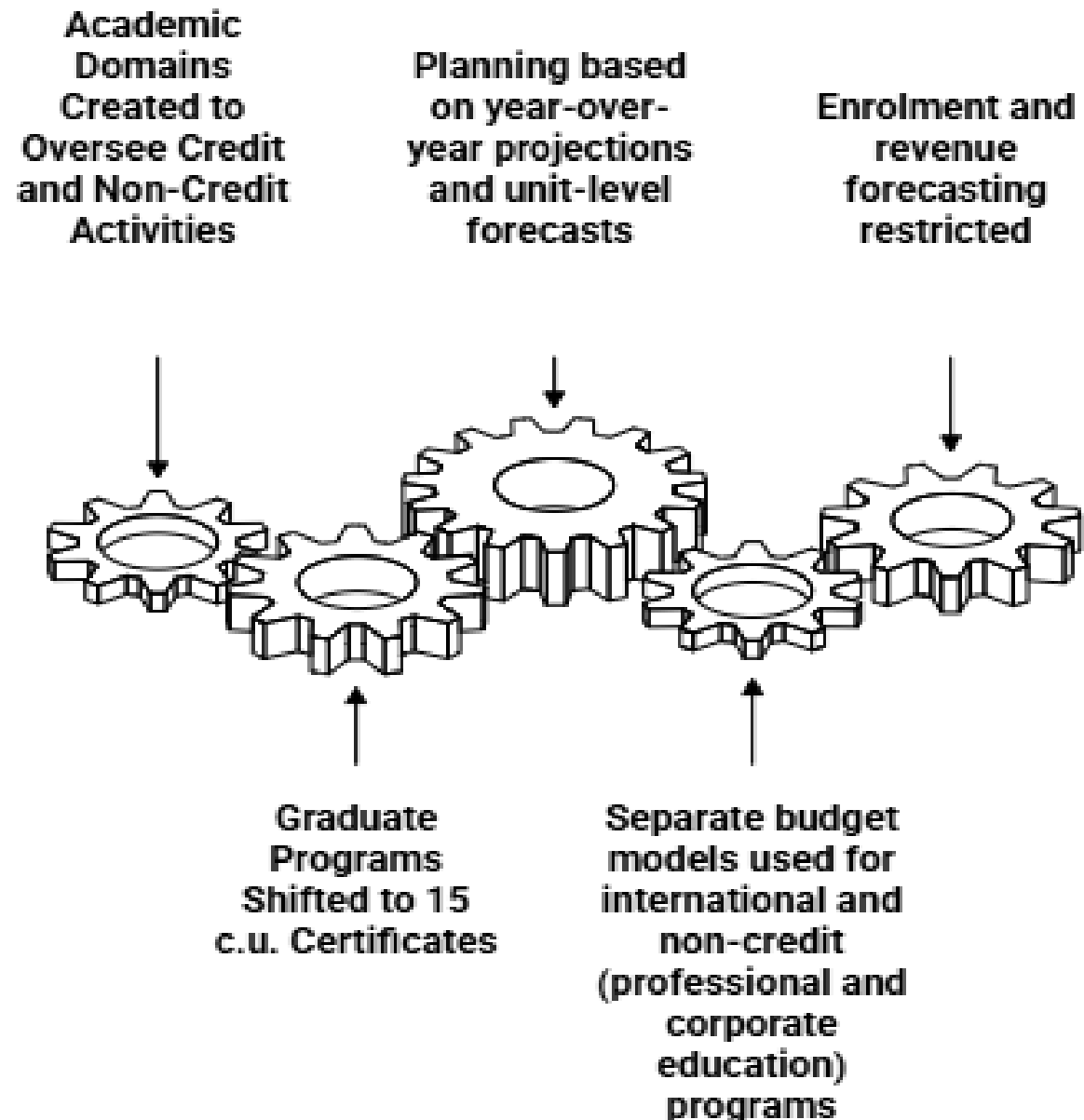


Searching for
One Story

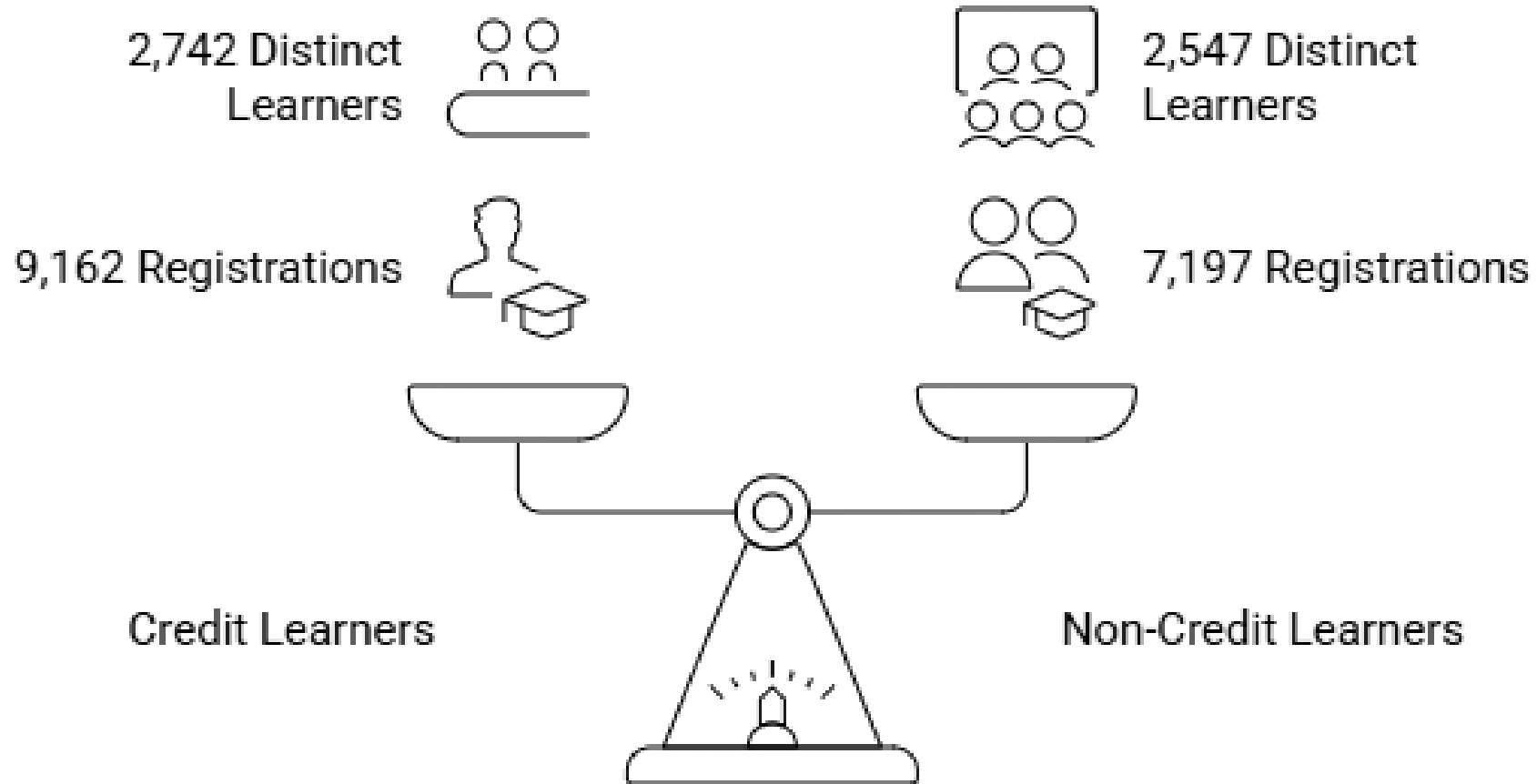
Differentiating credit and non-credit (as revenue) in Quebec

Credit Offerings		Non-Credit Offerings
<p>Relies on government subsidies and regulated tuition Politically exposed and enrollment-sensitive</p>	<p>Revenue Source and Control</p> 	<p>Funded entirely by learner or sponsor fees Market-based pricing with full retention</p> 
<p>Subject to significant government clawback Reduces net institutional income</p>	<p>International Student Revenue</p> 	<p>Fully retained by the institution No international clawback applied</p> 
<p>Constrained by provincial policy and residency status Not fully market-priced</p>	<p>Pricing Flexibility</p> 	<p>Set by the institution or market demand Not regulated by residency status</p> 

The planning context in 2022



Balancing credit and non-credit (as enrolment)



Includes all credit and non-credit learners and registrations for AY 2025, including McGill Community of Lifelong Learning

Search for One Forecasting Story

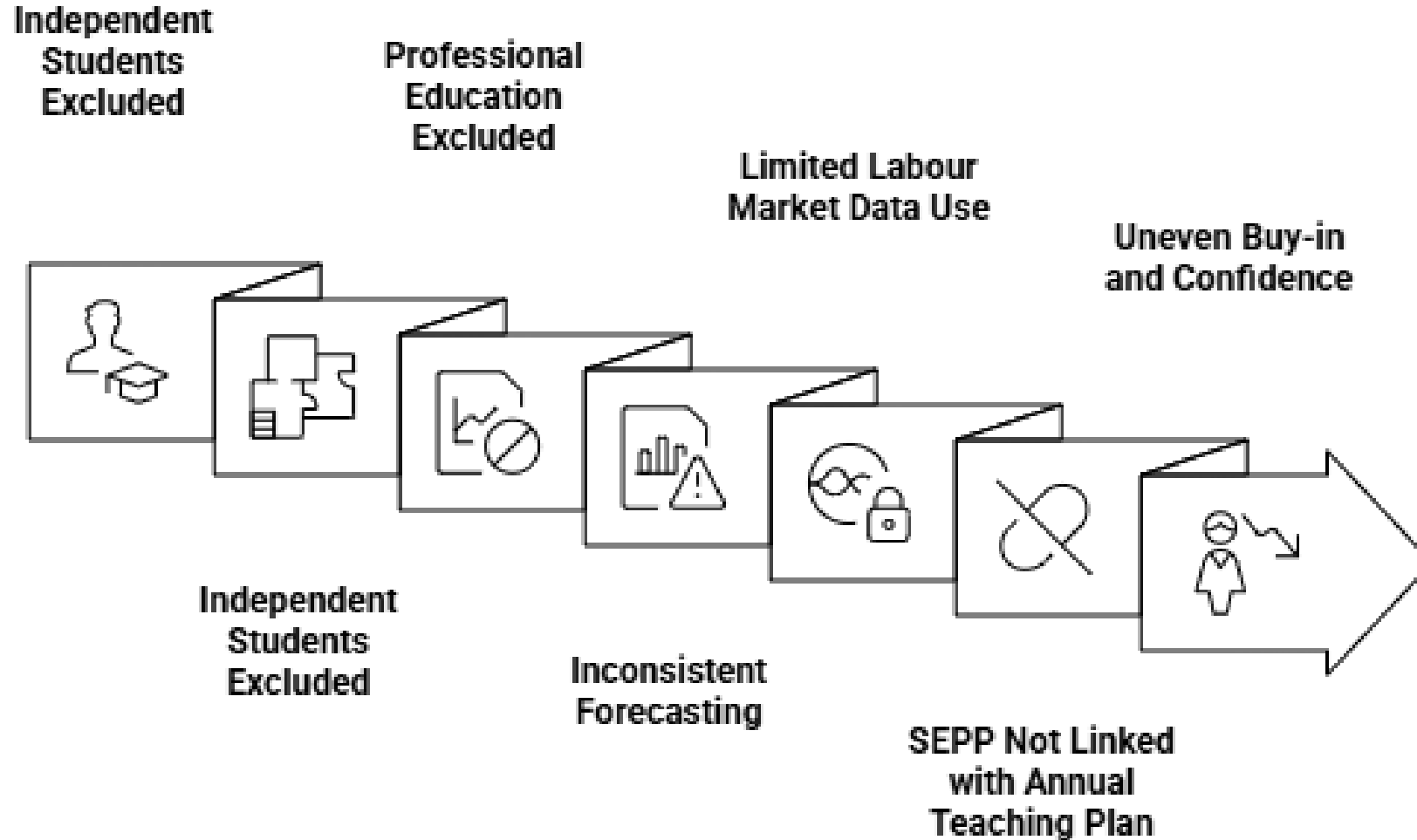
- Strategic Enrolment Analysis Team (SEAT) created
 - Shared definitions and baseline reports
 - Better reporting alignment between credit & non-credit
- Strategic Enrolment Planning Process (SEPP) introduced for 3-year forecasts
 - Integrated credit and non-credit program enrolment
 - No financial data included




A 3D yellow puzzle piece is centered on a dark grey background. The background features a grid of faint, dark grey puzzle piece outlines. The text is overlaid on the puzzle piece.

What challenges might arise
from one forecasting model?

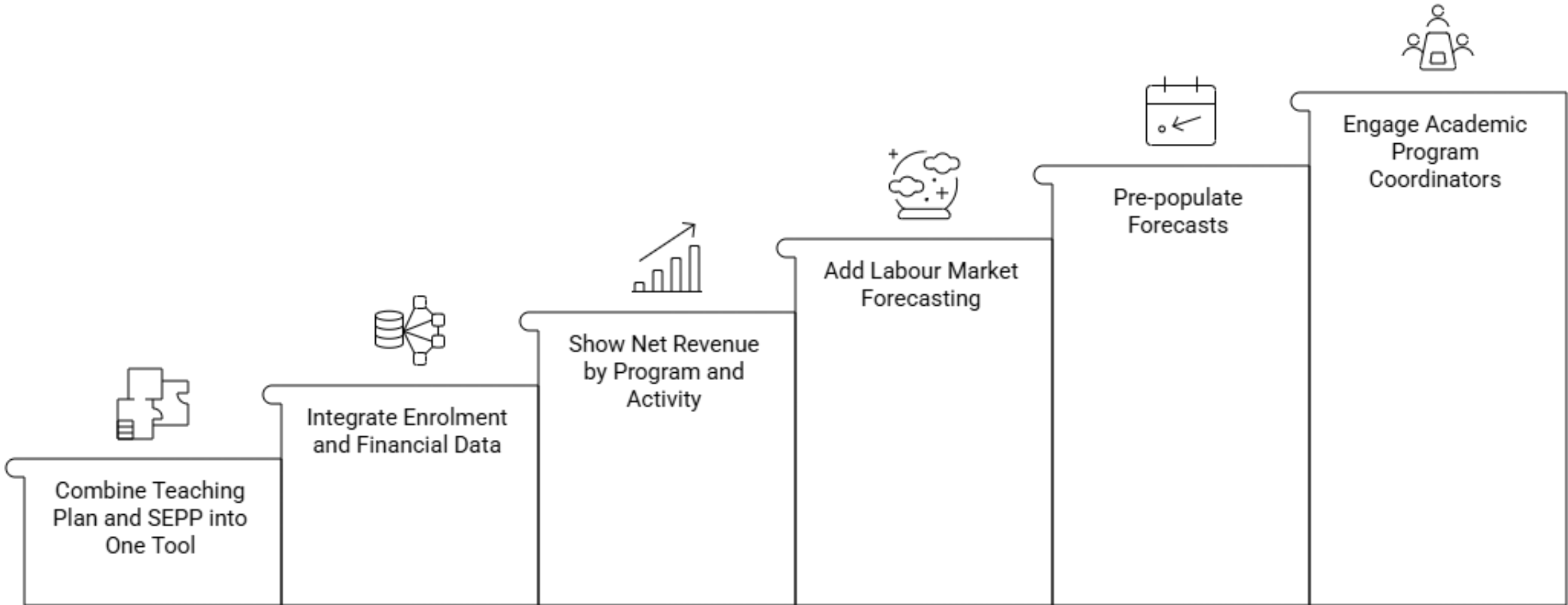
SEPP Pilot Implementation Challenges





Integrating
More Than
One Story

Developing an Improved Forecasting Tool

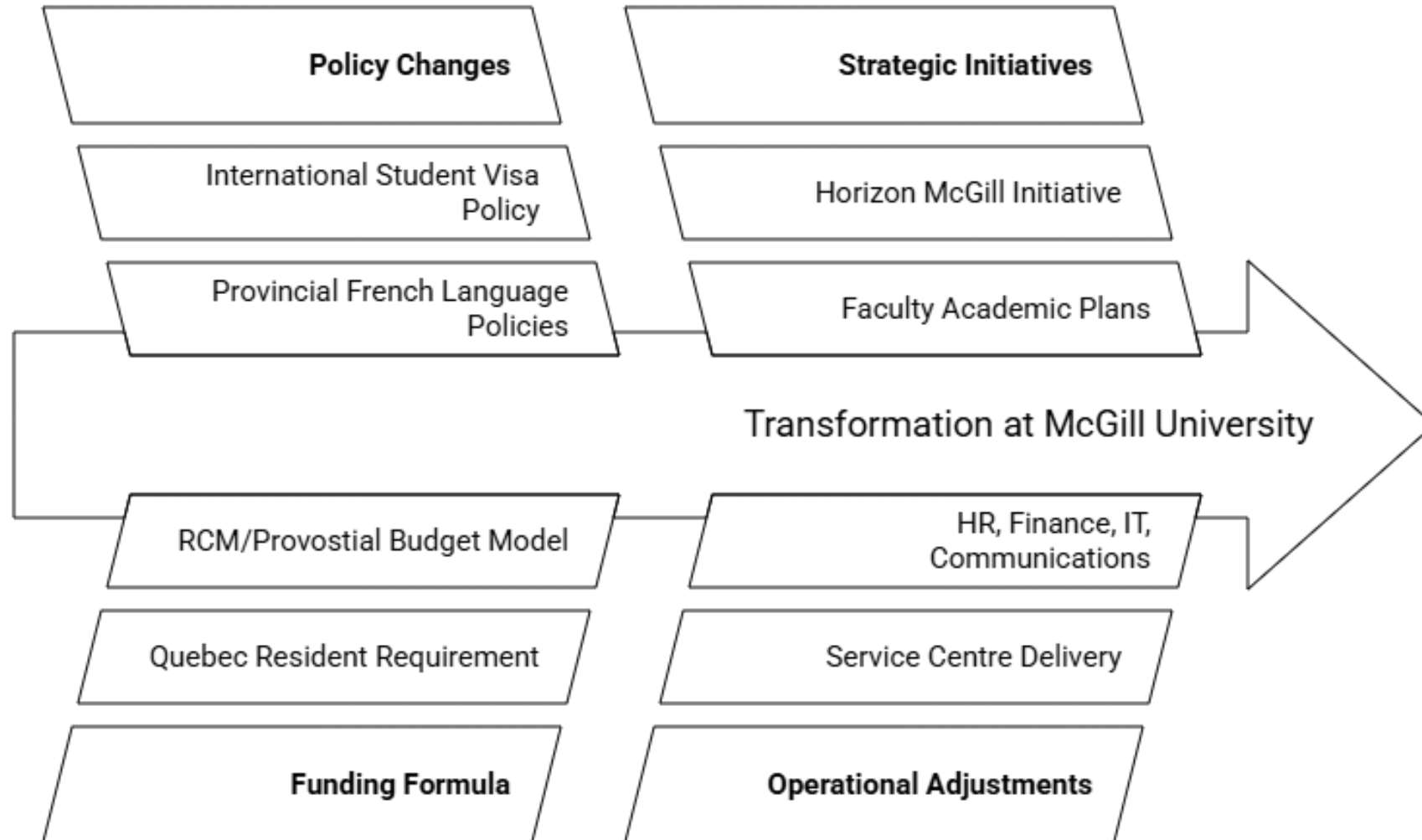


What does the tool look like?

What challenges and opportunities might arise from this model?



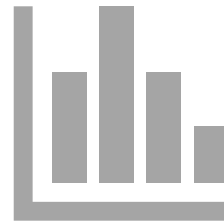
Factors Driving Transformation at McGill University



Lessons learned



Patience, perseverance,
and agility



Link enrolment and
financial data formulas



Engage the strengths of
your team

Why “now more than ever”?

Strategic Need for Continuing Education



Need for Models to Respond to Rising Revenue Expectations



Need to Address Increased Program Complexity



Need to Confront Less Reliable Trends



Need for Shared Accountability



Need for Shared and Transparent Data



Need to Clarify Shared Assumptions



QUESTIONS? COMMENTS?

Thank you!
