



P.O. Box 4071
Madison, CT 06443
(203) 421-5169

www.catholicschoolmgmt.com

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Enrollment Planning and Reporting: Keys to Successfully Managing the Catholic School Enrollment Cycle

Catholic School Management has long advocated that an Enrollment Management Plan (EMP) be developed, operationalized, and updated on an annual basis for each Catholic elementary and secondary school. The EMP should be considered a supporting component of the school's long-range strategic plan. Today the "National Standards and Benchmarks for Effective Elementary and Secondary Schools"¹ calls for such planning in Standard 13. Standard 13 reads, "An excellent Catholic school enacts a comprehensive plan for institutional advancement based on a compelling mission through communications, marketing, enrollment management, and development." Benchmark 13.2 says, "The enrollment management plan requires the governing body to review and the school leader/leadership team to supervise annual and continuous measurement and analysis of both enrollment and retention patterns for all student groups."

The current environment reinforces the need for effective enrollment planning. The following three steps will help your school in creating a plan to develop a sustainable enrollment process:

- Step I: Create a shared vision;
- Step II: Articulate a plan;
- Step III: Analyze and assess.

STEP I: Create a Shared Vision

Before you begin to develop recruitment strategies, plan recruiting events, buy tchotchkes for giveaways, launch this season's social media campaign, and train ambassadors, you should get **everyone** on the same page. This is, unfortunately, a critical step that is often skipped. Those charged with recruitment, admissions, and retention are easily tempted to jump quickly into planning before **identifying** the specific needs and possible opportunities for their school's enrollment.

Richard J. Burke, *President*
Jacqueline Abrahams
Shirley A. Arnold
Edward J. Barrett
Joseph W. Bracco
Albert E. Catelli
Lois J. Cavucci
Carol Cimino, SSJ, Ed.D.
Michael M. Denison
Lois K. Draina, Ph.D.
Donald L. Edwards, Ed.D.
Rachel L. Ellingson
Richard E. Feitel
Gary J. Gelo
Frank A. Glowaty
Stephen J. Hammond
Susan R. Hoffman
Joseph D. Hollowell
Marianne B. Johnson
Jennifer C. Kensel
Kevin M. McDonough
Richard J. McGrath, OSA, Ph.D.
Aline P. Norwood
Deborah L. Papa
G. Joseph Peters
Thomas H. Posnanski
Kim R. Pryzbylski, Ph.D.
Maria J. Ribera
Mary Beth Riley
Mary Lou Schoone
Charmaine S. Torma
Robert S. Webb
Nicholas M. Wolsonovich, Ph.D.
Frederick Zilian, Ph.D.

A. Gather key stakeholders which include representatives of these areas of your school. They will vary from school to school (small elementary to larger high school), but should represent a variety of perspectives:

1. Administrators: president, principal, vice principal, lead teachers;
2. Communications and marketing staff and/or volunteers;
3. Catholic identity spokesperson: campus ministry, religion chairperson;
4. Ambassadors: parent, alumni, student.

B. Effectively use a SWOT analysis to broaden your shared vision:

1. Pre-meeting SWOT (Strengths, Weaknesses, Opportunities, and Threats) exercise:

Have each stakeholder pre-populate the Strengths and Weaknesses categories of a SWOT form. If you have an enrollment report from the previous year, this is the time to analyze and reference it. It is recommended that you use a shared electronic file, such as a Google doc, to build the data from your stakeholder group.

a. Strengths: List current school strengths; encourage use of any factual data (surveys and reports); discourage use of anecdotal data.

b. Weaknesses: Encourage use of any factual data as well as anecdotal data/perceptions.

2. Meeting to bring together all stakeholders in one room:

a. Review the **strengths** and identify consensus (e.g., strong math program) and similarly review **weaknesses** and identify consensus (e.g., standardized test scores in reading comprehension).

b. Lead a group activity of identifying **opportunities/threats**: This should result in initiatives that you should jump on because they will strengthen your position for recruitment. Equally important are concerns/threats, which if not addressed, will continue to erode image and positioning for effective recruitment. Using the examples above, an initiative might be: *Our math program results need to be highlighted and communicated in all marketing to parents as a foundation for STEM*

learning. A concern might be: Not addressing the standardized test results puts our students at a disadvantage for their next academic step.

c. Outcome: As a group, agree on aligned goals for school program, marketing, and recruitment. Some goals may be adopted by administrators or school staff for delivery, some shared, and others will be the sole responsibility of the admissions staff or volunteers. Now you are ready to start writing your plan!

STEP II: Articulate a Plan: Retention; Recruitment; Admissions

While this second step has many parts, each is critical for a shared and sustainable approach to enrollment management. Make each phase of enrollment a section of your plan and clearly record the existing process so you are able to refine it in the next cycle.

A. Retention

Retention is often the last part of the EMP to be considered, and we suggest that you make it the first. Grades 1 through 8 in elementary or 10 through 12 in high school represent from 75% to 90% of your total enrollment! You are best served to plan on retaining them. In your stakeholder meetings, did you identify patterns of attrition that threaten your enrollment? Now is the time to plan strategies for addressing them. All retention goals will involve a retention team along with retention outreach strategies as you 're-recruit' your current population. The following should be included in the Retention section of the EMP.

1. Retention goals: From your stakeholder planning meetings, you have identified goals for the academic year, and you can now start building strategies and timelines to achieve them.

Example: *Improve retention from 5th to 6th grade through planned communication to families of program value.*

2. Identify the retention team and clarify their role in the overall process and for each goal:

Example:

- Admissions staff;
- Administration;
- Marketing staff;
- Faculty;
- Ambassadors: students, parents, alumni.

- 3. Retention outreach:** The outreach section should include strategies for each goal and a calendar.

Example:

- September (Faculty) – invite 5th grade parents to science classroom to observe lesson;
- October (Administration) – send results of math testing;
- November (Admissions and Robotics Coordinator) – hold open house for robotics team.

- 4. Retention process:** How are students re-enrolled? What is the timeline/calendar? How is the process communicated to parents?

- 5. Data collection:** As you move through the retention calendar, it is important to collect data for your end-of-the-year enrollment report. Find a good tool to bank the data as you move through the academic year. Data should include:

- Attrition at each grade level: time of withdrawal and reason;
- Parent and student survey results.

(Note: Also see the Nov. 2009 issue of the *Catholic School Management Letter*, Vol. XXXI, No. 2.)

B. Recruitment

This is where the rubber meets the road. Now it is time for tchotchkes, giveaways, tweets, and ambassador training! You are ready to lead your team in recruiting!

- 1. Review goals:** From your stakeholder planning meetings, you have identified goals for the year, and you can now start building strategies and timelines to achieve them.

Example: *Build social media outreach to families to communicate regularly school news and sustain and grow interest in school after Open House.*

- 2. Identify the recruitment team, and clarify and document their role in the overall process and for each goal:**

Examples include role descriptions for enrollment responsibilities for:

- Admissions staff;
- Administration;
- Marketing staff;
- Faculty;
- Enrollment Committee;
- Ambassadors: students, parents, alumni.

- 3. Recruitment outreach:** The outreach plan will align to your goals and should include events, communication, or something completely new! Example:

- Open house and target events: The annual open house is important for visibility, but consider following it with specific target events: athletics; science; art shows; etc.
- School and parish visits: Never underestimate the value of reaching out to feeder schools and parishes. Get to know the key leaders and develop personal relationships with them.
- Communications: Include appropriate social media outreach (Facebook, Twitter, Instagram); web site (keep information current and easily accessible); brochures; and publications.

- 4. Data collection:** As you move through the recruitment calendar, it is important to collect data for your end-of-year, annual enrollment report. Find a good tool to bank the data as you move through the academic year. Data should include:

- Attendance at events: These numbers should be easily disaggregated by age, role, grade, zip code, parish/feeder school, relationship to school (alumni, sibling);
- Printed material: Cost per piece, distribution, impact (determined through survey results);
- School and other visits: This data should be disaggregated by types of schools, # of students met, zip code;
- Social media: Gather analytics;
- Web site: Gather analytics on 'hits': what is opened, frequency;
- Parent and student survey results.

C. Admissions

Moving to the admissions phase should be the first indicator of how you are meeting your enrollment goals. Don't be discouraged if you are not 100% successful. Building a strong enrollment cycle can take time.

- 1. Review goals:** From your stakeholder planning meetings, you have identified goals for the year, and you can now start building strategies and timelines to achieve them. Example: *To increase the diversity of the student population.*

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2. **Identify the admissions team and clarify their role in the overall process:** Develop a calendar timeline for the team for reading applications and determining decisions.
3. **Identify admissions process:** This will vary from school to school, but it is important and helpful to have the process clearly outlined in the plan. Include the following:
 - o Criteria for admissions;
 - o Process for decision: clear admission; conditional admission; waitlist status; not admitted;
 - o Process for appeals: Who reads appeals? How are decisions made?
4. **Data collection:** As you move through the admissions process, it is important to collect data for your end-of-year, annual enrollment report. Data should include:
 - o Application information: # of applications, schools, academic profile, demographics;
 - o Decisions: # of admissions, conditional, waitlist, denials;
 - o Parent and student surveys.

STEP III: Analyze and Assess – Annual Enrollment Report

After the school enrollment is determined for the academic year, this last step will be the beginning of the coming year’s Enrollment Management Plan. The data collected and reported in this report will inform the next stakeholder meeting and determine successes and opportunities for the upcoming enrollment cycle, as well as weaknesses that need to be addressed. This report should be shared with appropriate groups at the end of the school year: administration, Board, parish councils, diocesan departments of education.

A. Table of Contents:

1. Annual Goals and Progress Report: Developed at stakeholder meetings;
2. Retention Report: Disaggregation of data for trends;
3. Recruitment Report: Disaggregation of data for trends;
4. Admission Report: Disaggregation of data for trends;
5. Executive Summary with progress toward goals and suggestions for continuing work.



¹ Center for Catholic School Effectiveness, School of Education, Loyola University, Chicago in partnership with the Barbara and Patrick Roche Center for Catholic Education, Lynch School of Education, Boston College, March 2012