

# Independent School Management

for advancement professionals in

ADMISSION | DEVELOPMENT | MARKETING COMMUNICATIONS

## Admission and Enrollment Management Assessment

An effective and productive admission and enrollment management operations/office is essential to a school's long-term ability to sustain excellence in student programs and deliver its mission with distinction. An accountable and results-oriented office must evaluate how well its operations reflect best practices and whether objectives are being achieved. A standard metric makes this evaluation possible.

The following questionnaire provides a framework for appraising your performance and reviewing the practices that define success. Admission and enrollment management professionals can use these metrics to analyze the state of their operations and establish a baseline from which to measure the effectiveness of future strategies. The questions themselves suggest ways to implement best practices—and suggest a framework for measuring and reporting progress to the Head, the Board, and the school community on an ongoing basis.

Full enrollment is the result of two effective strategies that occur in the school: recruitment (strategies to attract and enroll new families) and re-recruitment (strategies to encourage families to re-enroll). Effective recruitment leads to healthy wait pools of mission-appropriate students. Effective re-recruitment is critical for a school to enjoy and sustain full enrollment and to supporting a culture of philanthropy at your school. Families that re-enroll children year after year form an enthusiastic, supportive corps who validate for themselves and others in the school community that they have made the right choice of school for their children and families.

ISM has identified 18 variables that correlate strongly with a private-independent school's ability to sustain excellence over time, known as the ISM Stability Markers. The Admission and Enrollment Management Assessment examines the practices and operations that contribute to greater success on the two markers described below.

### Stability Marker 6 - Enrollment Demand in Excess of Supply

Enrollment demand in excess of supply is comprised of two distinct metrics that you can calculate below based on your own school's data. The highest possible score for this marker is 12.

- A. Over the last three years, how substantial was your wait pool of mission-appropriate students? (Substantial is defined as enough students to fill one new section at your school's major entry point or points.)
- Always had a substantial wait pool (6)
  - Averaged a substantial wait pool (4)
  - Averaged less than a full section (2)
  - Never had a wait pool/under enrolled (0)
  - Don't know (0)
- B. Over the last three years, has your school's retention (re-recruitment) rate been 90% or greater?
- All three years (6)
  - Two of the last three years (4)

- One of the last three years (2)
- None of the last three years (0)
- Don't know (0)

Your School's Stability Marker Six Score \_\_\_\_/12

### Stability Marker G - Internal Marketing

Internal marketing refers to the strategies schools take to ensure a positive, mission-centered culture that bonds students, faculty, staff, parents, and alumni to the school, supporting successful recruitment, re-recruitment, and development. Strong internal marketing requires a robust enrollment management plan implemented by a team of key administrators from all areas of the school. The existence and qualities of the team and plan inform your Stability Marker G score. You will see references to this plan and the team that manages it within questionnaire that follows.

The items in this assessment are intended to help you reflect on the range of admission and enrollment management practices-- including office operations, planning, and materials -- that contribute to your school's ability to successfully recruit new families, re-recruit current families, and support a culture of philanthropy. Your responses to these questions will help you identify areas in need of attention. The strategies you adopt in these areas will enhance your school's score on Stability Marker 6 (enrollment demand in excess of supply) and Stability Marker G (internal marketing).

This survey contains 31 questions divided into four categories with the following point assignments:

- 1) Recruitment (30 points)
- 2) Re-Recruitment (32 points)
- 3) Materials and Marketing (19 points)
- 4) Office Operations and Planning (19 points)

Your total for all questions results in a score out of 100 that you can treat as an overall index of your admission and enrollment management operations. All surveys of this kind must, of course, be considered in light of your own school's circumstances, and can be refined and tailored to your own operations.

The following scale can be used as a general guideline for self-scoring. A score of 90-100 is an indication of an excellent admission and enrollment management program and a solid indicator of enrollment stability. Scores of 75-89 show a good performance. A result in the 60-74 range suggests that while in some areas of admission and enrollment management you are doing well, there are other areas of your operations in need of improvement. A score of 40-59 indicates that your admission and enrollment management operations are still being developed and demonstrate significant weaknesses that need to be addressed. Below 40 should be graded as poor, suggesting an admission and enrollment management program that has much to improve in order to make a significant contribution to the school.

Each of the four sections of the survey can also be evaluated separately as an indicator of where you stand in those areas. The self-scoring scale for interpreting these results are in the table below:

	<b>Great</b>	<b>Good</b>	<b>Getting Started</b>	<b>Poor</b>
Recruitment (30)	25 and above	18–24	12–17	Below 12
Re-Recruitment (32)	27 and above	21–26	14–20	Below 14
Materials and Marketing (19)	16 and above	12–15	8–11	Below 8
Operations and Planning (19)	16 and above	12–15	8–11	Below 8

### Recruitment: Prospective and New Family Experience

1. Please answer the following questions regarding your admission process.

- Is your admission process welcoming, inclusive, and family-centered?  
 Yes (2)  Sometimes (1)  No (0)  Don't know (0)
- Does your admission process reflect an understanding that students have significant impact on the eventual decision to enroll?  
 Yes (2)  Sometimes (1)  No (0)  Don't know (0)
- Is there a clearly defined admission process and timeline?  
 Yes (2)  Sometimes (1)  No (0)  Don't know (0)
- Are admission events and family visits convenient and scheduled to accommodate family needs?  
 Yes (2)  Sometimes (1)  No (0)  Don't know (0)

**No. 1 Subtotal Score (0–8) \_\_\_\_\_**

2. During your open house/informational sessions, do prospective families have the opportunity to:

- Interact with students?  
 Yes (2)  Sometimes (1)  No (0)  Don't know (0)
- Interact with faculty?  
 Yes (2)  Sometimes (1)  No (0)  Don't know (0)
- Observe short demo lessons that are taught by exemplary faculty and actively engage students?  
 Yes (2)  Sometimes (1)  No (0)  Don't know (0)

**No. 2 Subtotal Score (0–6) \_\_\_\_\_**

3. Please indicate whether the following statements are true about your school tours.

- Campus tours permit parents to see all levels from applicant's current grade through your school's highest grade level.  
 Yes (2)  Sometimes (1)  No (0)  Don't know (0)

b. Campus tours focus on students and learning, permitting parents to see aspects of student life and co-curricular opportunities.

- Yes (2)  Sometimes (1)  No (0)  Don't know (0)

c. Admission appointments and campus tours are personalized for each family.

- Yes (2)  Sometimes (1)  No (0)  Don't know (0)

**No. 3 Subtotal Score (0–6) \_\_\_\_\_**

4. During admission meetings with families and students, do you:

a. Have open-ended conversational experiences designed to understand what the family and student value and seek?

- Yes (2)  Sometimes (1)  No (0)  Don't know (0)

b. Provide applicant students with the opportunity to have a personal conversation with a faculty or staff member?

- Yes (2)  Sometimes (1)  No (0)  Don't know (0)

**No. 4 Subtotal Score (0–4) \_\_\_\_\_**

5. Are the following tuition assistance practices followed in your office?

a. Tuition assistance is available for both new and returning families.

- Yes (2)  Sometimes (1)  No (0)  Don't know (0)

b. Awards are based on financial need that is verified by an independent party.

- Yes (2)  Sometimes (1)  No (0)  Don't know (0)

**No. 5 Subtotal Score (0–4) \_\_\_\_\_**

6. Do all applicants have a shadow day/school visit where they are matched with a buddy and given the opportunity to experience classes and activities that match their interests?

- Yes (2)  Sometimes (1)  No (0)  Don't know (0)

**No. 6 Subtotal Score (0–2) \_\_\_\_\_**

**RECRUITMENT SCORE (0-30) \_\_\_\_\_**

### Re-recruitment: Current Family Experience

7. Does your school conduct a new student orientation that provides new students with the opportunity to:

a. Get to know key faculty and staff?

- Yes (2)  No (0)  Don't know (0)

b. Meet peers/make friends before the first day of school?

- Yes (2)  No (0)  Don't know (0)

c. Get a sense of what to expect on the first day?

- Yes (2)  No (0)  Don't know (0)

d. Locate their classes, lockers, and key facilities?

- Yes (2)  No (0)  Don't know (0)

**No. 7 Subtotal Score (0–8) \_\_\_\_\_**

8. To support your new families, does your school:
- Distribute a new family orientation packet?  
 Yes (3)  Sometimes (1.5)  No (0)  Don't know (0)
  - Assign a buddy family with like interests and children near in age as soon as the new family is admitted?  
 Yes (3)  Sometimes (1.5)  No (0)  Don't know (0)
  - Provide opportunities for new parents to be in contact with other parents and key school personnel?  
 Yes (3)  Sometimes (1.5)  No (0)  Don't know (0)

**No. 8 Subtotal Score (0–9) \_\_\_\_\_**

9. How effective is your office at coaching all members of the community about their role in successful re-recruitment and in sustaining a culture of client service?
- Extremely effective (2)  Effective (1.5)  Somewhat effective (1)  
 Ineffective (.5)  Not at all (0)  Don't know (0)
10. How effective is your office at ensuring that your current students and families have opportunities to experience what it is like to be enrolled at the next level?
- Extremely effective (2)  Effective (1.5)  Somewhat effective (1)  
 Ineffective (.5)  Not at all (0)  Don't know (0)

11. Is the contract renewal process clear and convenient, providing information about timelines, tuition, and tuition assistance?
- Yes (2)  Somewhat (1)  No (0)  Don't know (0)

12. Do you have an Enrollment Management Team that includes representatives from all areas of the school—advancement, operations, and academic (not a Board Committee)—whose primary responsibility is the school's student-retention, re-recruitment, and constituent relations program?
- Yes (3)  No (0)  Don't know (0)

13. How effective is your Enrollment Management Team (or your office) at identifying and addressing growth objectives, attrition trends, and student/parent satisfaction?
- Extremely effective (4)  Effective (3)  Somewhat effective (2)  
 Ineffective (1)  Not at all effective (0)  Don't know (0)

14. Is there immediate and ongoing outreach to families (by Division Director/Head/Principal, School Head, or another person identified as having the closest relationship to the family) as soon as their intention not to re-enroll is communicated?
- Yes (2)  Sometimes (1)  No (0)  Don't know (0)

**No. 9–14 Subtotal Score (0–15) \_\_\_\_\_**

**RE-RECRUITMENT SCORE (0-32) \_\_\_\_\_**

## Materials and Marketing

15. Please answer the following questions regarding your admission materials.
- Do they accurately reflect the mission of the school?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

- Do they accurately reflect your school's Portrait of the Graduate (3-5 statements that describe your graduates as living proof of your mission in action)?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)
- Are they attractive, compelling, and of high quality?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)
- Do they provide appropriate information concisely and in an accessible way?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

**No. 15 Subtotal Score (0–4) \_\_\_\_\_**

16. Is your school's website:
- Attractive?  
 Yes (1)  No (.5)  Don't know (0)
  - Full of high impact photos and video of the student experience?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)
  - Updated regularly?  
 Yes (1)  No (.5)  Don't know (0)
  - User-friendly and intuitive?  
 Yes (1)  No (.5)  Don't know (0)
  - Effective as a recruitment tool?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)
  - Effective at providing all information relevant to the admission process?  
 Yes (1)  No (.5)  Don't know (0)
  - Informative about the cost of tuition and the tuition assistance program?  
 Yes (1)  No (.5)  Don't know (0)

**No. 16 Subtotal Score (0–7) \_\_\_\_\_**

17. Does your social media presence:
- Celebrate student learning?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)
  - Stimulate positive word-of-mouth?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)
  - Invite conversation and feedback?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)
  - Invite prospective families to events/activities?  
 Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

**No. 17 Subtotal Score (0–4) \_\_\_\_\_**

18. Do your application materials:
- Provide a checklist of the materials required for admission?  
 Yes (1)  No (0)  Don't know (0)

b. Provide a timeline of clearly defined deadlines for materials submission?

Yes (1)  No (0)  Don't know (0)

c. Ensure that each requirement/question specifically relates to the admission decision?

Yes (1)  No (0)  Don't know (0)

d. Include a user-friendly online application?

Yes (1)  No (0)  Don't know (0)

**No. 18 Subtotal Score (0-4) \_\_\_\_\_**

**MATERIALS AND MARKETING SCORE (0-19) \_\_\_\_\_**

**Office Operations and Planning**

19. Do you have a mission statement by any name for admission and enrollment management that articulates the reason your department exists within the context of your school's mission?

Yes (1)  No (0)  Don't know (0)

20. Does your office make decisions based on an enrollment management plan that clearly identifies goals, strategies, time frames, responsibilities, and costs?

Yes (1)  Somewhat (.5)  No (0)  Don't know (0)

21. Does your office maintain a comprehensive admission enrollment management budget that covers all expenditures?

Yes (1)  No (0)  Don't know (0)

22. Are your admission staff highly knowledgeable about all aspects of your school, including (e.g., mission, programs, competitive advantage, testing, and graduate placement statistics)?

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

23. Does each member of the Admission and Enrollment Management staff have a professional development plan and an annual evaluation?

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

**No. 19-23 Subtotal Score (0-5) \_\_\_\_\_**

24. Does your office track and analyze the following data to achieve enrollment and retention goals?

a. Inquiries and web usage

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

b. Referrals

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

c. Applicant data

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

d. Conversion rates (inquiry to applied; applied to accepted; accepted to enroll)

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

e. Enrollment data

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

f. Marketplace and demographic data

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

g. Budgeted funding for tuition assistance

Yes (1)  Sometimes (.5)  No (0)  Don't know (0)

**No. 24 Subtotal Score (0-7) \_\_\_\_\_**

25. How effective is the information collected during the admission process (e.g. tests, transcripts, recommendations) at predicting the eventual success of the applicant at your school?

Extremely effective (1)  Effective (.75)  Somewhat effective (.5)  Ineffective (.25)  Not at all effective (0)  Don't know (0)

26. How effective is your office at testing the validity of your admission decisions by examining the performance of students after they enroll (e.g., grades, withdrawals, discipline records)?

Extremely effective (1)  Effective (.75)  Somewhat effective (.5)  Ineffective (.25)  Not at all effective (0)  Don't know (0)

27. How effective is your office at following procedures that ensure the accuracy and integrity of the database?

Extremely effective (1)  Effective (.75)  Somewhat effective (.5)  Ineffective (.25)  Not at all effective (0)  Don't know (0)

28. How effective is your office at producing and communicating appropriate data to the School Head, academic staff, Finance Committee, Development Office, and Marketing Communications Office?

Extremely effective (1)  Effective (.75)  Somewhat effective (.5)  Ineffective (.25)  Not at all effective (0)  Don't know (0)

29. How effectively does your office follow policies and procedures that are legally compliant and that adhere to industry-wide professional standards?

Extremely effective (1)  Effective (.75)  Somewhat effective (.5)  Ineffective (.25)  Not at all effective (0)  Don't know (0)

30. Is it understood that the Admission Director's compensation cannot be contingent upon, or based on, enrollment numbers?

Yes (1)  No (0)  Don't know (0)

31. Does your Board appropriately limit its involvement in admission to defining the budget enrollment number, and avoid seeking to influence specific admission decisions?

Yes (1)  No (0)  Don't know (0)

**No. 25-31 Subtotal Score (0-7) \_\_\_\_\_**

**OFFICE OPERATIONS AND PLANNING SCORE (0-19) \_\_\_\_\_**

**Conclusions and Next Steps**

A strong admission and enrollment management program makes essential contributions to the success of an independent school.

Your scores on this assessment help identify your present strengths and weaknesses and inform the development of strategies to improve your admission and enrollment management operations. ISM recommends a structured approach to acting on these results.

First, review your overall score. This will give you a sense of how much needs to be accomplished, which gives you a basis for projecting a timeline and assessing what people and resources will be required to achieve your objectives.

Second, look at all the cases where you responded “don’t know.” The quickest remedial action you can take on these points is to find the answers to these questions. Any actions you take must be informed by a thorough understanding of your current situation.

Third, identify specific areas where your operations are least optimal: e.g., Are your recruitment events designed with families and their needs in mind? Are you attending to the needs of your families once they are admitted? Do your materials and marketing accurately reflect the school?

The areas where your scores are lowest are where your efforts should first be focused. If there are a number of such areas, it is essential to prioritize. Select two or three items that you will address in the near term, and concentrate your action planning on improving those aspects of your operations.

Finally, communicate and coordinate with your School Head and the other advancement officers (in marketing communications and development) about your survey results and your plans for moving forward. These metrics provide an objective basis for discussion about the responsibilities, needs, and successes of the admission and enrollment management operation, and its place in the school’s strategy for the future.

<b>Total Admission Enrollment Management Assessment Score</b>	
Recruitment	_____ /30
Re-Recruitment	_____ /32
Materials and Marketing	_____ /19
Office Operations and Planning	_____ /19
<b>TOTAL</b>	_____ /100
<b>Stability Marker Score</b>	_____ /12

<b>Scoring Results</b>	
90–100	Great
75–89	Good
60–74	Fair
40–59	Getting Started
39 or less	Poor

## Discussion

All advancement staff—in admissions, marketing communication, and development—face enormous scrutiny over return on investment, organizational performance, strategic governance, and their contribution to securing and sustaining your school’s future success.

Your responses on this survey will highlight for you those areas in which you are achieving excellence, and areas that you can target for improvement. The survey items give an indication of best practices in each area that you can use as a guide for reinforcing and improving the services you offer to your school and all your constituents. ISM recommends that you use these results to develop an action plan for deepening and strengthening the capacity and performance of your Advancement Team.

## Developing Your Action Plan

In light of your scores in this assessment, you can now proceed to consider your next steps to improve and enhance your advancement operations. This section is a guide to developing a plan of action.

### 1. Scope of action

Consider first your overall total score. This will give you a sense of where you stand with respect to an ideal program that implements the core values and pursues best practices in all phases of advancement. Your plan should start by estimating the scope of the actions you need to undertake to get closer to that objective.

How big is our task? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How long will it take? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What personnel and resources will we need? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### 2. Be informed

Your scores in this assessment are greatly affected by “Don’t know” responses. The scoring assumes that directors must be well informed about their existing operations in order to optimize them; hence it gives zero points for “Don’t know”. The first step in your action plan should be to review your responses, identify the things you don’t know, and find the answers. Your operation may be better than your scores suggest, but not knowing seriously hinders your ability to take constructive action.

What don’t I know? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will I find out? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### 3. Specific needs

Consider your score on each of the items. Your action plan should prioritize the ones with the lowest scores, as these are the areas of greatest need.

**Goal #1:** \_\_\_\_\_

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What actions are needed \_\_\_\_\_

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Personnel and resources required \_\_\_\_\_

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Timeline for implementation \_\_\_\_\_

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**Goal #2:** \_\_\_\_\_

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What actions are needed \_\_\_\_\_

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Personnel and resources required \_\_\_\_\_

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Timeline for implementation \_\_\_\_\_

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**Goal #3:** \_\_\_\_\_

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What actions are needed \_\_\_\_\_

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Personnel and resources required \_\_\_\_\_

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Timeline for implementation \_\_\_\_\_

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**Goal #4:** \_\_\_\_\_

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What actions are needed \_\_\_\_\_

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Personnel and resources required \_\_\_\_\_

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Timeline for implementation \_\_\_\_\_

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<sup>1</sup> The full survey is available through ISM's Survey Department and Advisory Services  
<sup>2</sup> We are grateful to Professor Gregory Guy of New York University for his lead work on developing these measures and analyses, and preparing this article