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About ISM

- We were founded in 1975
- We have served more than 8,500 client schools over the past 43 years
- We’re a research firm
- We’re passionate about mission
- We hold students at the center of all decision-making
- We are committed to you
Learning Objectives

◆ Take ISM’s Admission and Enrollment Management Assessment™

◆ Use Assessment as a Roadmap to Good Practice

◆ Turn Your Findings into Action: Your Four Part Admission and Enrollment Management Plan
ISM’s defines enrollment management as...

a continuous set of recruitment and re-recruitment strategies that enable your school to deepen the relationships it has with its constituents, bonding them ever more deeply and bringing them successively closer to your school’s mission, culture, and values.
Enrollment management, then, is not about what you say; it’s about what you do.
1. Assess
2. Score
3. Reflect
4. Plan
Discuss Your Findings
Spheres of Greatest Influence

{Examine every aspect of your students’ and parents’ experience}
Sphere 1: Market Position

- Price, Product, Process
- Purpose & Outcomes
- Competitive Niche
- Market Demographics
- Influencing the Market
Sphere 1: Market Position

Price, Product, Process

Purpose & Outcomes

Market Position
# Price Product Process Characteristics

<table>
<thead>
<tr>
<th>Marketplace Focus</th>
<th>Accessibility</th>
<th>Academic Product</th>
<th>Individualization</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Admission Selectivity</strong></td>
<td>Values-based</td>
<td>Ability-based</td>
<td>Broad-based</td>
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<tr>
<td><strong>Costs-to-Market</strong></td>
<td>Low</td>
<td>High</td>
<td>High</td>
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<tr>
<td><strong>Student-Staff Ratio</strong></td>
<td>High</td>
<td>Mid-range</td>
<td>Low</td>
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<tr>
<td><strong>Programmatic Focus</strong></td>
<td>Targeted outcomes</td>
<td>Targeted outcomes</td>
<td>Breadth of outcomes</td>
</tr>
<tr>
<td><strong>Outcome Characteristics</strong></td>
<td>Best prepared for values-driven life</td>
<td>Best prepared for next academic level</td>
<td>Best prepared for creating one’s own path</td>
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</tbody>
</table>
The Three Levers of Financial Equilibrium

- Compensation
- Hard Income
- Teacher-to-Student Ratio
ACTIVITY:
Price, Product, Process
What is Your Marketplace Stance?
{partner with another school}
Marketing in Private-Independent Schools is Unique

Your Students ARE Your Brand
You aren’t “selling” your school; you’re inviting students into a very particular learning experience—and inviting parents into a very particular peer community.
Marketing in Private-Independent Schools is Unique

To inspire people to act on that invitation to enroll, schools describe how students are positively impacted by their learning experiences in a suite of Purpose and Outcome Statements.
Purpose and Outcomes Statements
{Your Mission, Your Students, Your Faculty}

Mission Statement
Portrait of the Graduate
Characteristics of Professional Excellence

Strategic Plan/Strategic Financial Plan
Implications of Purpose and Outcomes Statements

- **Governance Level**: Mission, primary marketplace stance, and strategic financial planning implications

- **Executive Level**: Hiring, new teacher induction, professional growth culture, and programmatic implications

- **School Culture Level**: CPEs are the operational means of achieving PoG and the foundation of your faculty’s professional growth culture

- **At Point of Origination**: a Cultural Rallying Point—Your Common Purpose
Mission Statement

- Should strive to answer the question: why does your school exist?
- Should strive to distinguish your school from all others
- Should be short enough in length that faculty and students can internalize it—like a mantra
- Should serve as the guiding document for why you do what you do
- Should articulate your “reason for being”
Mission statement for a music conservatory

“We exist because we cannot imagine a world without music.”
Exemplar Mission

Children are not vessels to be filled, but lamps to be lighted.

Shared by Jasmine Harris, the Lamplighter School, Dallas, TX
Exemplar Mission

The Piedmont School strives daily to be the educational oasis that quenches the thirst of students who learn differently.

The Piedmont School, High Point, North Carolina
Your Mission
Portrait of the Graduate: Definition and Samples
The Portrait of a Graduate

◆ Describes the students who graduate from your school, having been transformed by their experiences with you

◆ Ideally not more than three to five statements that describe not only who the students are, but how they will likely be compelled to act in the world as a result of who they have come to be
Your Portrait of the Graduate describes the student who has benefitted fully from your program

Sample Academy Graduates are…

- resilient in the face of challenge
- technologically adept and creative in their pursuit of solutions to complex problems
- goal-oriented within the framework of their values
- eager to embrace the next learning opportunity
- inclusive and culturally competent
- able to relax and experience joy
What are Characteristics of Professional Excellence?

Operational definition of our faculty “ideal”

- Focus on behaviors, values, and attitudes that must be present in strength within your faculty for your mission to come alive and the promise of the student you described in the Portrait of a Graduate to be fulfilled

- The list of 7-10 (or less) descriptors may be both operational and aspirational
Academy Teachers...

- challenge students to excel
- create opportunities for learning and growth within and beyond the academic day
- celebrate diversity and open-mindedness
- participate fully in the school community with authentic, multi-faceted engagement
- employ innovative teaching methods to cultivate the strengths of our students
- pursue professional and personal development throughout their lives
What REALLY Matters in Marketing and Enrollment Management?

{How your key constituents experience your school}

- Market Position
- School Culture
- Constituent Relationships

Students
Sphere 2: School Culture

School Culture

- Mission Delivery
- Student Experience
- Faculty Culture
- Predictability and Support
- Growth Model & Evaluation Process
- Perceived Return on Investment
Sphere 3: Constituent Relationships

- Anticipate their Needs
- Mitigate Obstacles
- Take a Personalized Approach
- Share Stories that “Prove It”

Enhanced Relationships
Tips for Strengthening Your Performance in All Four Assessment Domains

1. Recruitment
2. Re-recruitment
3. Materials & Marketing
4. Office Operations & Planning
Design an Interactive Open House

Invite exemplar faculty to teach short “demo” lessons to real students.
Why is this a better approach?

- It allows prospective parents to see their child enrolled at your school **{recruitment goal}**

- It allows parents of current students to see their child enrolled at the next grade level **{re-recruitment goal}**
Tips for strengthening your re-recruitment efforts

◆ Take an intentional approach to the integration of new families
◆ Establish an enrollment management team (shared accountability model)
◆ Empower faculty to communicate with parents in the manner they most need and want
Who might serve on your enrollment management team?

- Division Level Academic Leaders / Head of School
- Teacher Leaders
- Director of Admission and Enrollment Management
- Director of Marketing Communications
- Business Manager, Finance
  Director, and/or CFO
- Development Director
- Learning Support Team
Establish goals

- Start with the “why”—what do you want to accomplish?
- How frequently will you meet?
- What support/resources does the team need?
- What types of data should you collect and analyze?
- How will you involve others at the school?
- How will you establish a pipeline for information sharing?
- What strategies/tactics will help you achieve your identified goals?
- How will you know it’s working?
Tips for strengthening your materials and marketing

- Create and leverage a suite of purpose & outcomes statements (mission, student outcomes, and ideal teacher characteristics)

- Leverage high impact photos, student voices, and video

- Create a compelling website experience
Tips for strengthening your office operations and planning

- Collect and analyze data
- Use your analysis to inform your strategic enrollment management plan
- Use subsequent data sets to test the validity of your plan strategies
- Engage in ongoing professional development
Articulate a plan

Identify up to four findings from your assessment that, if made the focus of your plan, will have the highest positive impact on your admission and enrollment management outcomes. Express them as goals, then add strategies designed to achieve them.
Any Questions?
ISM is dedicated to the advancement of school management. We provide creative strategies by combining extensive research, proven management techniques, and personalized service.
Advancement Academy
July 22-26, 2019 • The Curtis • Denver, CO
For Experienced Professionals in
ENROLLMENT MANAGEMENT | DEVELOPMENT | MARKETING COMMUNICATIONS
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Administrators who complete ISM’s Advancement Academy will earn 40 IACP credits. ISM offers the only interdisciplinary set of credentials that recognizes learning across the areas of development, admission, and marketing communications in private-independent schools. Stand out and mark your achievements!

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Leading a Purpose and Outcomes Statements Workshop at Your School
Prepare your team for the work

- The work must be endorsed by the Head of School
- Educate your faculty, staff, and administrators about what P&O Statements are and why they matter
- Invite them to participate—share the date, time, and workshop agenda
- Preconfigure your breakout groups with representatives from each constituent group
- Identify a Purpose and Outcome Statement steering committee to finesse the draft statements for final review/affirmation
Start with Portrait of the Graduate
Who are the people you want in the room?

- Full faculty
- Support staff
- Academic leadership team
- Advancement team
- Operational leadership team
- In high school settings: rising seniors, seniors, and/or young alumni
In your Portrait of the Graduate breakout groups

- Choose a discussion facilitator
- Choose a time keeper—you have 45 minutes
- Choose a group recorder to capture your statements
- Choose a group spokesperson to report back your group’s final statements to the larger group
- Describe the students who graduate from your school, having been transformed by their experiences with you
- Distill your statements down to the five to seven most meaningful, succinct, and authentic representations of the __________ School graduate
Activating Questions
{to elicit student descriptors}

◆ What is unique about students at your school?

◆ What are the student behaviors and characteristics that you think are most linked to success later in life?

◆ What aptitudes and attitudes do your students have that make them unique among other students their age?

◆ How are students changed by their experiences at your school?
What do you do next?

\{Distill the collected statements into a draft version of the Portrait of the Graduate\}

- Compile (and save) all statements collected from every group into a shared electronic file

- Prior to the first finessing team meeting, ask individuals to cluster “like” statements

- From those clusters, ask each person to identify key themes

- As a team, agree upon a selection of themes/concepts that are most indicative of your students
What do you do next?

{Distill the collected statements into a draft version of the Portrait of the Graduate}

- Prior to the second finessing team meeting, have individuals go back to the original data set, and select the best words and phrases to describe each theme/concept/goal
- At the second finessing team meeting, consider the draft statements created by each member
- Which statement best captures the essence of what you intend?
- Are there words or phrases that you can pull from multiple statement iterations to make each statement better?
What do you do next?

{Distill the collected statements into a draft version of the Portrait of the Graduate}

- When you have settled on a final draft, return the Portrait of the Graduate in draft form to the same group who participated in the initial workshop
- Ask them to affirm the statements
- If they are not ready to affirm, schedule a third finessing team meeting to explore the specifics of their feedback
- Return to faculty for affirmation
- Publish your statements on your website and in your print materials
- Use them to inform every decision
Leading a Characteristics of Professional Excellence Workshop at Your School
Who do you want in the CPE breakout groups

- Full faculty
- Academic leadership team
- Advancement team—optional (in a listening capacity)
- Operational leadership team—optional (in a listening capacity)
In your Characteristics of Professional Excellence breakout groups...

- Choose a discussion facilitator
- Choose a time keeper—you have 45 minutes
- Choose a group recorder to capture your statements
- Describe the behaviors, attitudes, and values that must be present in strength among faculty to deliver on the promises made on behalf of students
- Distill your statements down to the 7-10 most meaningful, succinct, and authentic representations of teachers at your school
- Choose a group spokesperson to report back your group’s seven final statements to the larger group
Activating Questions

\{To elicit faculty descriptors\}

- What characteristics of your faculty attract families to your school?
- What bonds you to one another as a faculty?
- What is unique and exceptional about the teachers at your school?
- What experiences do faculty create for students in your school they are unlikely to experience anywhere?
Finessing Your CPEs and Other Considerations

- Follow the same process as articulated for the PoG
- Once affirmed, ask the same team of faculty/staff to articulate a set of basic teacher expectations (EEs) that all teachers are expected to demonstrate (due diligence items)—and that the HOS approves
- Use your CPEs to drive your professional growth culture
- Use for EEs as the foundation for faculty evaluation
- Provide a yearlong mentoring program for teachers who are new to your school, then have them identify growth areas using the CPEs by year two
- Create action plans for teachers who aren’t meeting EEs; if they demonstrate mastery, invite them to return to the creation of growth goals based on your CPEs