The Logan School
for creative learning

The DENVER WALDORF School

EAGLE ROCK SCHOOL
AND PROFESSIONAL DEVELOPMENT CENTER

THE COLORADO SPRINGS SCHOOL
EST. 1962

דעת
Denver Academy of Torah

EVERGREEN
country day
Education with Intention

MACK
MACKINTOSH ACADEMY

COLORADO ACADEMY
CA

Founded 1972
STANLEY
BRITISH PRIMARY SCHOOL

GRALAND
AMENDE OMNEM MONTEM
COUNTRY DAY SCHOOL

SE
St. ELIZABETH'S SCHOOL

ASPEN ACADEMY
GROW | LEARN | LEAD

Telluride Mountain School

MONTESSORI
SCHOOL OF EVERGREEN

MA
MACKINTOSH ACADEMY

W
WATERSHED SCHOOL

Bixby School

√

St MARY'S ACADEMY
FAITH COMMUNITY JUSTICE RESPECT

BCD
BOULDER COUNTRY DAY SCHOOL

Escuela de Guadalupe
founded 1999

FRIENDS SCHOOL
Challenging minds, nurturing spirits.

Steamboat
MOUNTAIN SCHOOL

MAC
MONTESSORI ACADEMY
OF COLORADO

DENVER JEWISH
DAY SCHOOL
Extraordinary Education. Timeless Traditions. Inspired Lives.

Colorado Rocky Mountain School

Vail Mountain School
Established 1962
CHARACTER | KNOWLEDGE | COMMUNITY

H
HAVERN SCHOOL
Learning to Soar

DAWSON SCHOOL

SHINING MOUNTAIN
WALDORF SCHOOL

HMI

INTERNATIONAL SCHOOL OF DENVER

M
MONTESSORI
School of Denver

St ANNE'S
EPISCOPAL SCHOOL

ASPEN
COUNTRY DAY SCHOOL

THE MCCLELLANDSCHOOL
CURIOSITY & EXPLORATION. PERSEVERANCE. ACHIEVEMENT. FAMILY & COMMUNITY.

DENVER ACADEMY
The Way You Learn Best

ACIS Thanks ISU Insurance

For Sponsoring Workshops at the 34th Annual Leadership Conference:
Planning for Today; Envisioning Tomorrow

ISU Insurance Services of Colorado (ISU) is a 139-year-old independent insurance brokerage firm, partnering with independent schools on their commercial insurance, risk management and employee benefits protection.

The Way Forward: Enrollment Management in 2022 and Beyond

ACIS Conference
October 14, 2022

The Enrollment Management Association

- Global network of 1,300+ member schools and organizations; year-round professional development & learning

- Gold-standard tools for smarter enrollment decisions: SAO, SSAT, Character Skills Snapshot, Student Prospect List

- Specialized research, analysis, and publications (reminder: complete your SOTI survey!)

EMA

Our vision is to champion transformational education journeys.

Our tools and resources provide insights beyond academics so schools can empower students to seamlessly navigate their unique paths to success.

EMA

Agenda

1   **Enrollment Outlook**

2   **Strategic Enrollment Management**

3   **Additional Resources**

4   **Q & A**

Rapid Focus Groups

What brought you here today?

1

Enrollment Outlook

EMA

The enrollment landscape continues to be disrupted.

- Some schools are **more full than ever** as families move into their area or have a newfound interest in independent schools.

- Other schools are **struggling with enrollment** as public options reopen and families feel economic pressure.

- **Demographic, historic, economic, and global** trends that existed before the pandemic continue to impact our work.

Stagnating population growth will influence schools' enrollment goals

CHILDREN AS A SHARE OF THE POPULATION IN SELECTED METRO AREAS, 2010, 2020, AND 2025 (PROJECTED)

	2010	2020	2025
Baltimore	23.0%	21.3%	20.2%
Boston	21.6%	20.0%	19.1%
Miami	21.7%	19.7%	18.7%
New York	22.8%	20.9%	19.8%
Philadelphia	23.3%	21.5%	20.4%
San Francisco	21.2%	19.8%	18.9%
Seattle	22.8%	21.6%	20.8%
Washington	23.9%	22.0%	21.0%

Source: NAIS Demographic Center

- Fewer births, more deaths, and uneven immigration contributed to the lowest U.S. population growth since the 1930s.

- Roughly 300,000 fewer births were estimated in 2021 due in part to COVID-19.

- Children made up 22.1% of the total population in 2020 (vs. 35.7% in 1960).

Source: 2020 U.S. Census.

Stagnating population growth will influence schools' enrollment goals

- The pandemic has had a disproportionate impact on small schools, especially those with <100 students. In contrast, schools with 500+ students have maintained enrollment or increased slightly.

- Lower schools and lower divisions experiencing more challenges than upper schools as the squeeze on enrollment moves through the grades.

Only 69% of rural schools reported either meeting or exceeding their 2021-2022 budget net tuition goals compared to 83% overall.
—EMA Member Flash Survey, October 2021.

CHANGES IN THE TOTAL NUMBER OF STUDENTS IN EACH GRADE, 2010-2011 TO 2020-2021

	2010-2011 to 2015-2016	2015-2016 to 2020-2021
Preschool	-13%	4%
Kindergarten	-6%	-1%
1st Grade	-6%	-4%
2nd Grade	-5%	-5%
3rd Grade	-1%	-7%
4th Grade	0%	-5%
5th Grade	1%	-4%
6th Grade	5%	-3%
7th Grade	5%	-2%
8th Grade	2%	2%
9th Grade	6%	0%
10th Grade	7%	-1%
11th Grade	4%	2%
12th Grade	4%	3%

Table 2, Figure 1, and Figure 2 Source: NAIS, Data and Analysis for School Leadership (DASL)

Location Can Make a Difference

EMA

Seattle-Tacoma
3.8%

Bridgeport, CT
0.0%

Boston
0.8%

Chicago
-4.4%

Philadelphia
5.7%

New York City
-2.0%

Denver
7.4%

Baltimore, MD
-2.8%

San Francisco
5.1%

Atlanta
1.5%

Washington, DC
5.8%

Los Angeles
-0.5%

Charlotte
6.4%

Dallas-Fort Worth
2.2%

Miami
13.5%
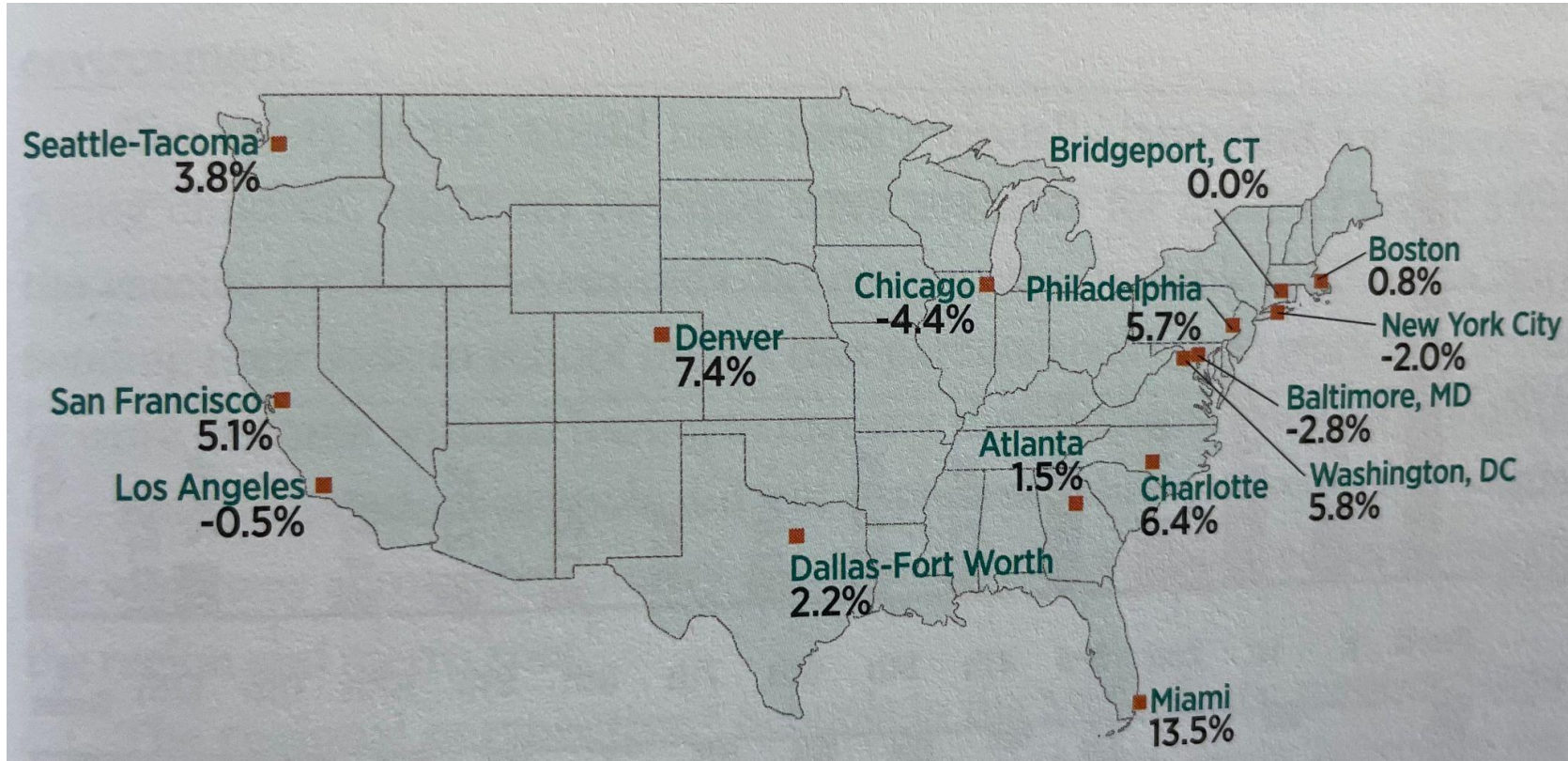
Colorado
Gained $26.59 billion in annual AGI*
Wealth Migration 1992-2019

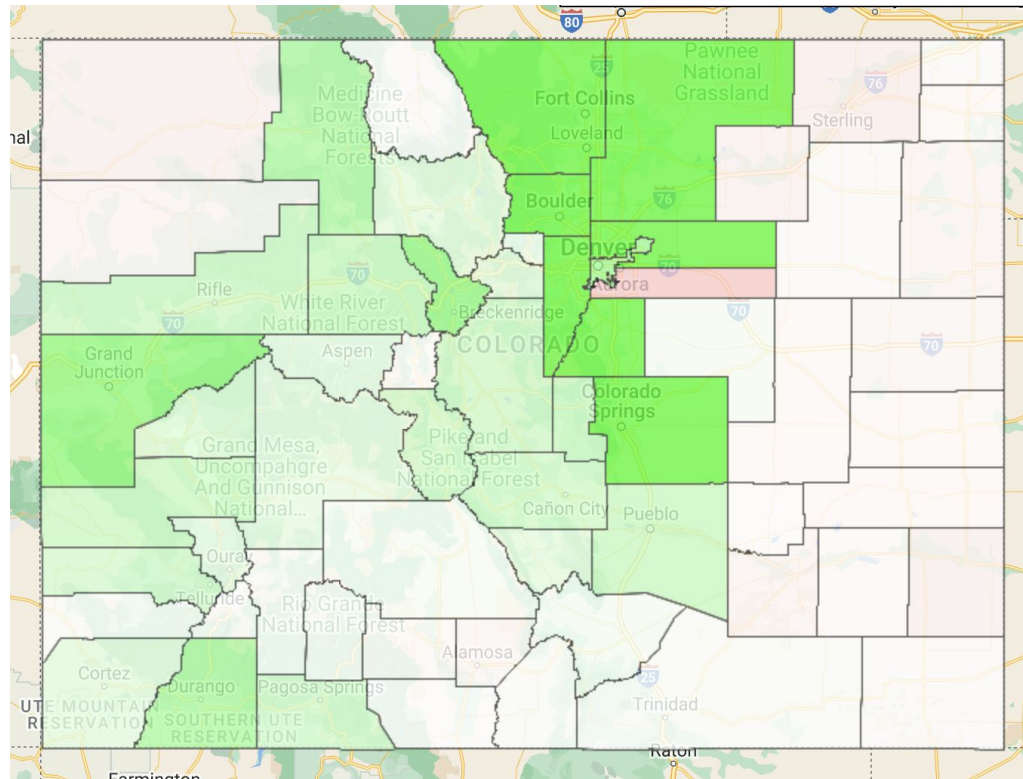**$374** of adjusted gross income gained in the last 8 seconds.
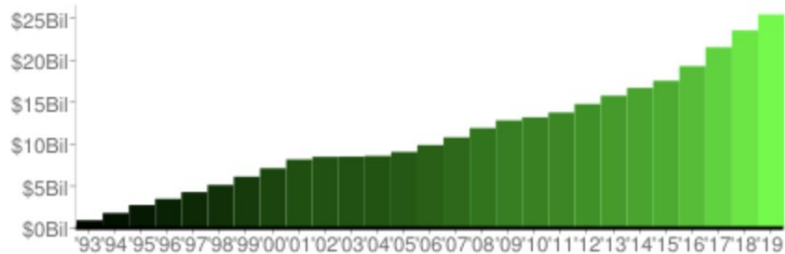
Gained Wealth From:

$7.09 billion	California
$3.46 billion	Illinois
$2.08 billion	New York
$1.94 billion	Texas
$1.26 billion	Virginia

Lost Wealth To:

$862.61 million	Arizona
$718.90 million	Florida
$556.82 million	Montana
$377.00 million	Washington
$349.19 million	Idaho

EMA

Wealth Gained (Lost), in billions:

($1.5)	($1.2)	($0.8)	($0.5)	($0.2)	$0.2	$0.5	$0.8	$1.2	$1.5

Source: How Money Walks

Boulder County (CO)
Gained $1.79 billion in annual AGI*
Wealth Migration 1992-2019

$41 of adjusted gross income gained in the last 13 seconds.
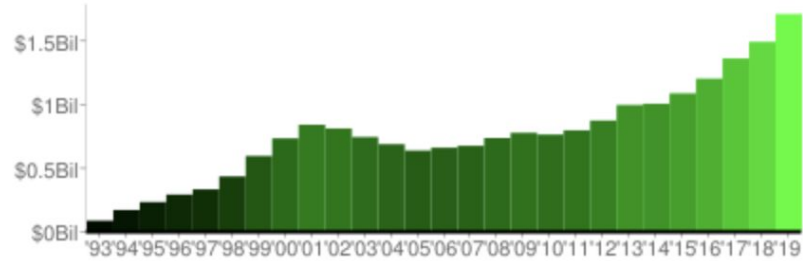
Gained Wealth From:
$243.43 million	Santa Clara County, CA
$218.20 million	Cook County, IL
$167.69 million	Los Angeles County, CA
$109.05 million	San Diego County, CA
$96.33 million	Alameda County, CA

Lost Wealth To:
$686.44 million	Weld County, CO
$387.43 million	Denver County, CO
$342.65 million	Larimer County, CO
$238.50 million	Adams County, CO
$167.24 million	Jefferson County, CO

EMA

Wealth Gained (Lost), in billions:

($1.5)	($1.2)	($0.8)	($0.5)	($0.2)	$0.2	$0.5	$0.8	$1.2	$1.5
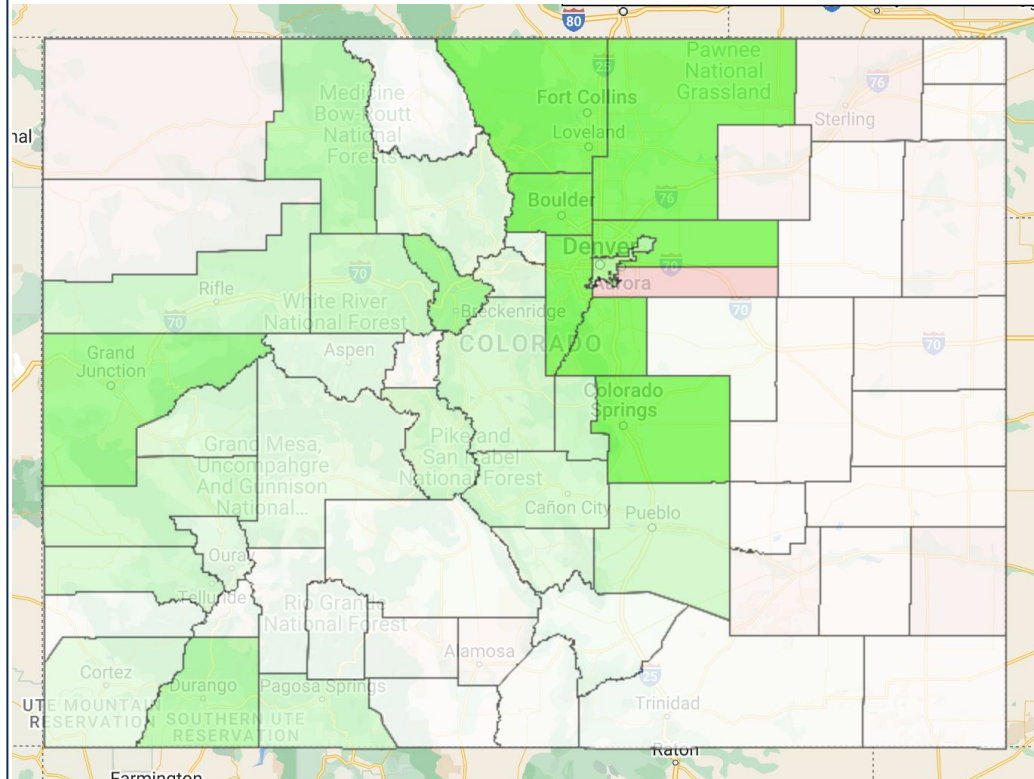
Source: How Money Walks

Charter School & Ind. Schl. Growth

Percent change in enrollment, by school type, 2009–2010 to 2019–2020*

School type	Percent change
All schools	2.4%
Traditional public	-0.9%
Public charter	113.1%
Catholic	-13.3%
Other religious schools	3.5%
Nonsectarian private	16.9%

EMA
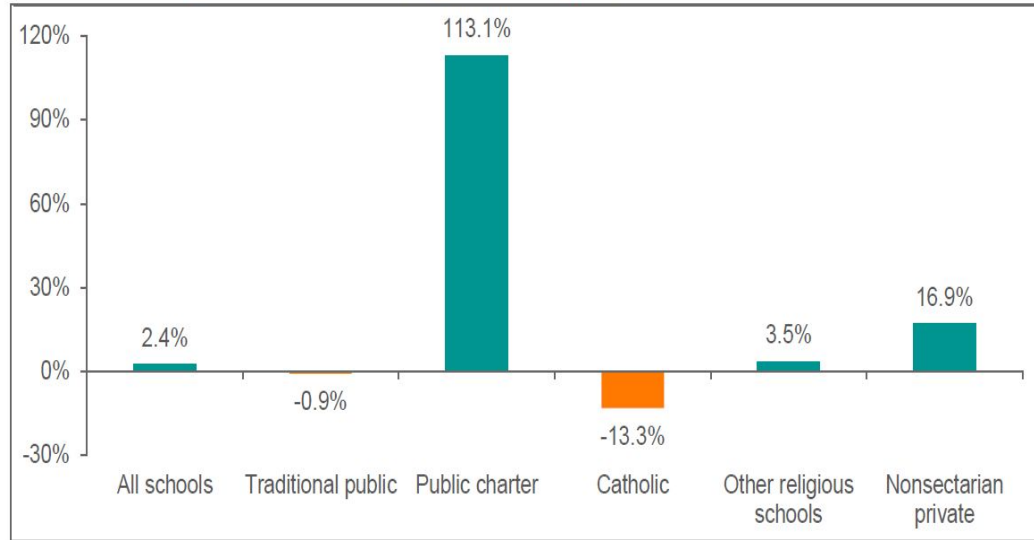
HEADLINE NEWS FROM THE *NAIS TRENDBOOK*

Enrollment Rebounds

After falling early in the pandemic, median enrollment grew in 2021-2022. A major driver: surges in pre-K through third grade.

Median enrollment per school	
2020-21	378
2021-22	396

*National Association of Independent Schools,
The State of K-12 Enrollment 2021-2022, May 2022 National, May 2022 and NAIS 2022-23 Trendbook*

Int'l Student Interest in U.S. Higher Ed

EMA

2020/21	22%	26%	52%
2021/22	43%	19%	38%
2022/23	65%	23%	12%

■ Increase   ■ Stayed the same   ■ Decrease
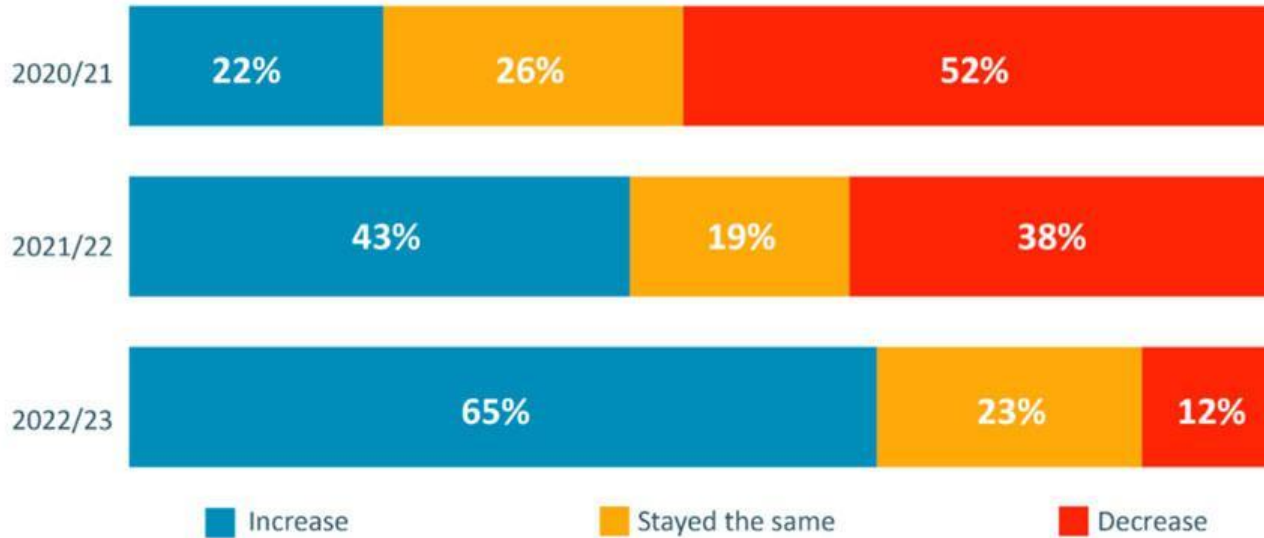
*More than 6 in 10 surveyed US colleges and universities are receiving
more international student applications for the 2022/23 academic year. Source: IIE*

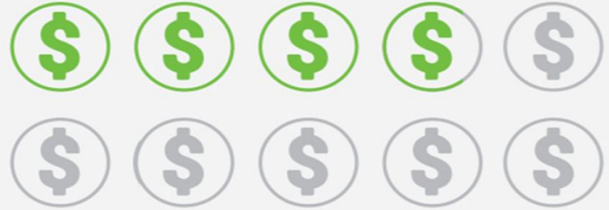**82%**

The vast majority of parents shopping for independent schools are Gen Xers in their 40's-50s.

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Decision Factors

EMA

	Rank (When Choosing to Apply)	Rank (When Choosing to Enroll)
Academics	1	1
Clubs & Activities	15	2
Sports	5	3
Diversity	7	4
College Counseling	14	5
Financial Aid	16	6

Value of the Investment

38% Only 38% of parents said they were "extremely satisfied" with the value of their investment in private schools.

With the amount of money parents are paying in tuition, schools should hope that more than four in ten are extremely sure they are getting their money's worth.

Blackbaud 2021 K–12 Independent Schools Parent Survey

The **Enrollment Management** Association

Enrollment Management Disruptors
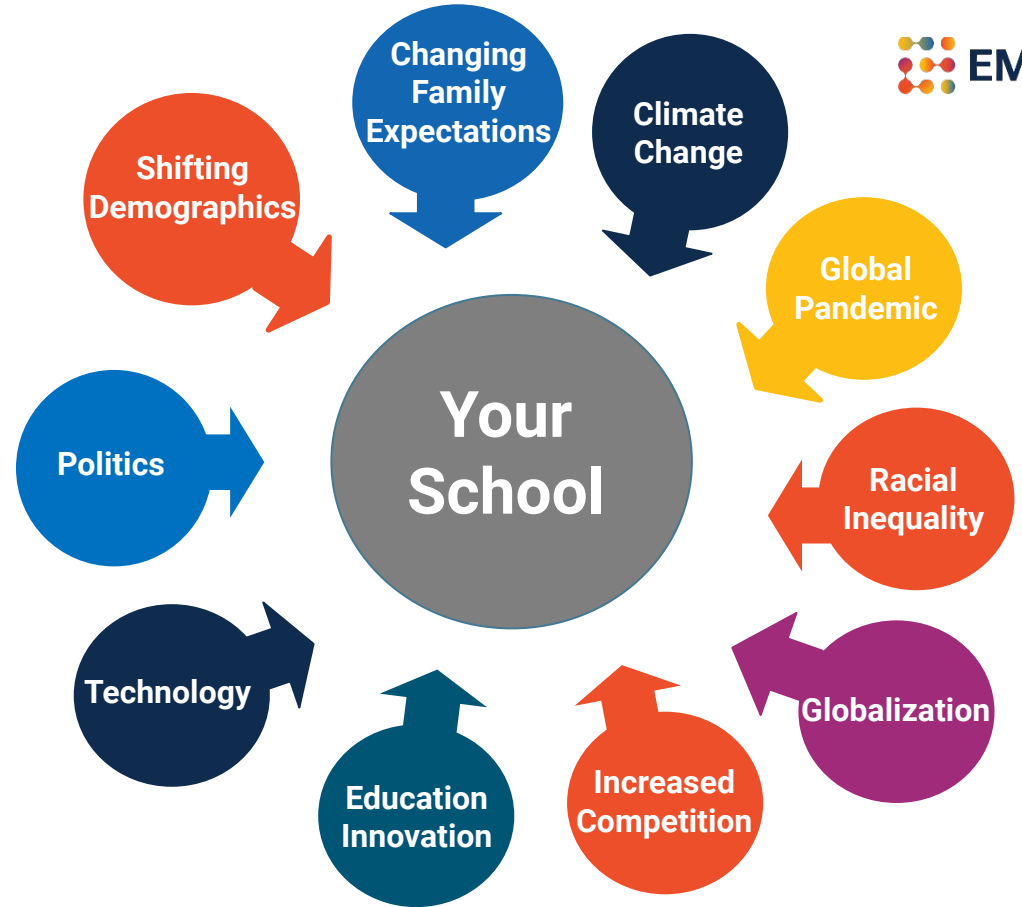
Rapid Focus Groups

What is your biggest enrollment success?

Rapid Focus Groups

What is your biggest enrollment challenge?

How should we respond?

Schools must shift from an admission mindset to an **enrollment management** approach.

3

Enrollment Management is a school-wide approach.

FMA

STRATEGIC ENROLLMENT SPECTRUM

CULTURE & BELONGING

INSTITUTIONAL STRATEGY

PROGRAMS & OUTCOMES

MARKETING & RECRUITMENT OF NEW FAMILIES

MISSION & BRAND

TUITION & FINANCIAL STRATEGY

SELECTION & ONBOARDING OF NEW FAMILIES

FAMILY ENGAGEMENT & RETENTION

The Enrollment Management Spectrum is a **roadmap** for admission and enrollment leaders and a **framework** for others to understand how their work contributes to enrollment.

The Spectrum is a framework.

A small day school in an urban context is different from a large rural boarding school. Yet we wrote the Spectrum for all kinds of schools. Each school should be able to see themselves in the spectrum and use it as a tool to inform their work.

The Spectrum is a tool each school can apply to their own context.

Overarching Levers

Overarching spectrum levers are critical to the enrollment health of the school.

These aspects cross multiple domains and therefore require leadership from the head of school, board of trustees, teachers, and other school leaders.

EMA

CULTURE & BELONGING

INSTITUTIONAL STRATEGY

PROGRAMS & OUTCOMES

MARKETING & RECRUITMENT OF NEW FAMILIES

MISSION & BRAND

TUITION & FINANCIAL STRATEGY

SELECTION & ONBOARDING OF NEW FAMILIES

FAMILY ENGAGEMENT & RETENTION

STRATEGIC ENROLLMENT SPECTRUM
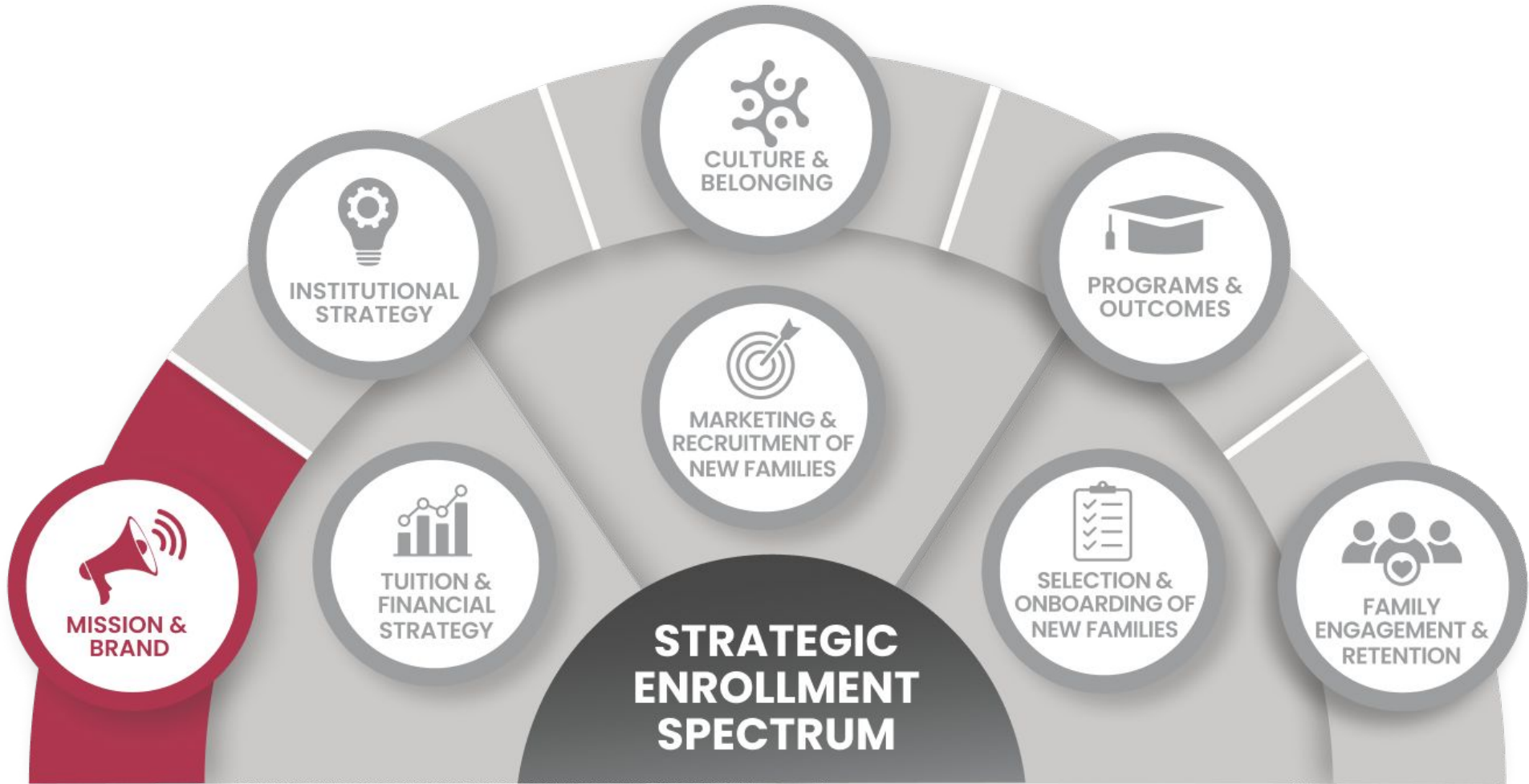
Mission & Brand

The school stands for something larger than itself.

All aspects of the school are deeply and authentically connected to the school's mission and values which are well understood by internal and external audiences.

From Shedd Aquarium's mission statement...

"Curiosity highlights how the Shedd experience brings people closer to animals and their ecosystems. We believe that everyone who connects with Shedd has an inner marine biologist, a scientist who wants to learn more, ask questions and simply be amazed."

EMA

Who is your Wellington?
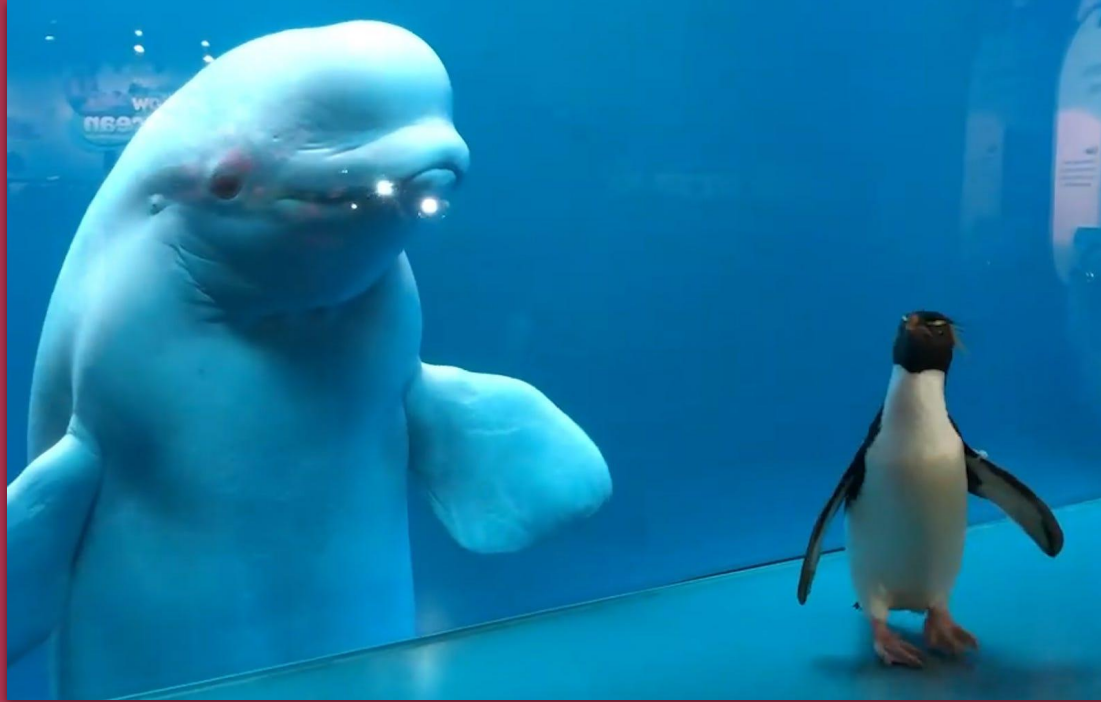
Mission & Brand

Act not just as HOS, but as Chief Enrollment Evangelist

Equip HOS with stories about our mission

Connect features to benefits to mission
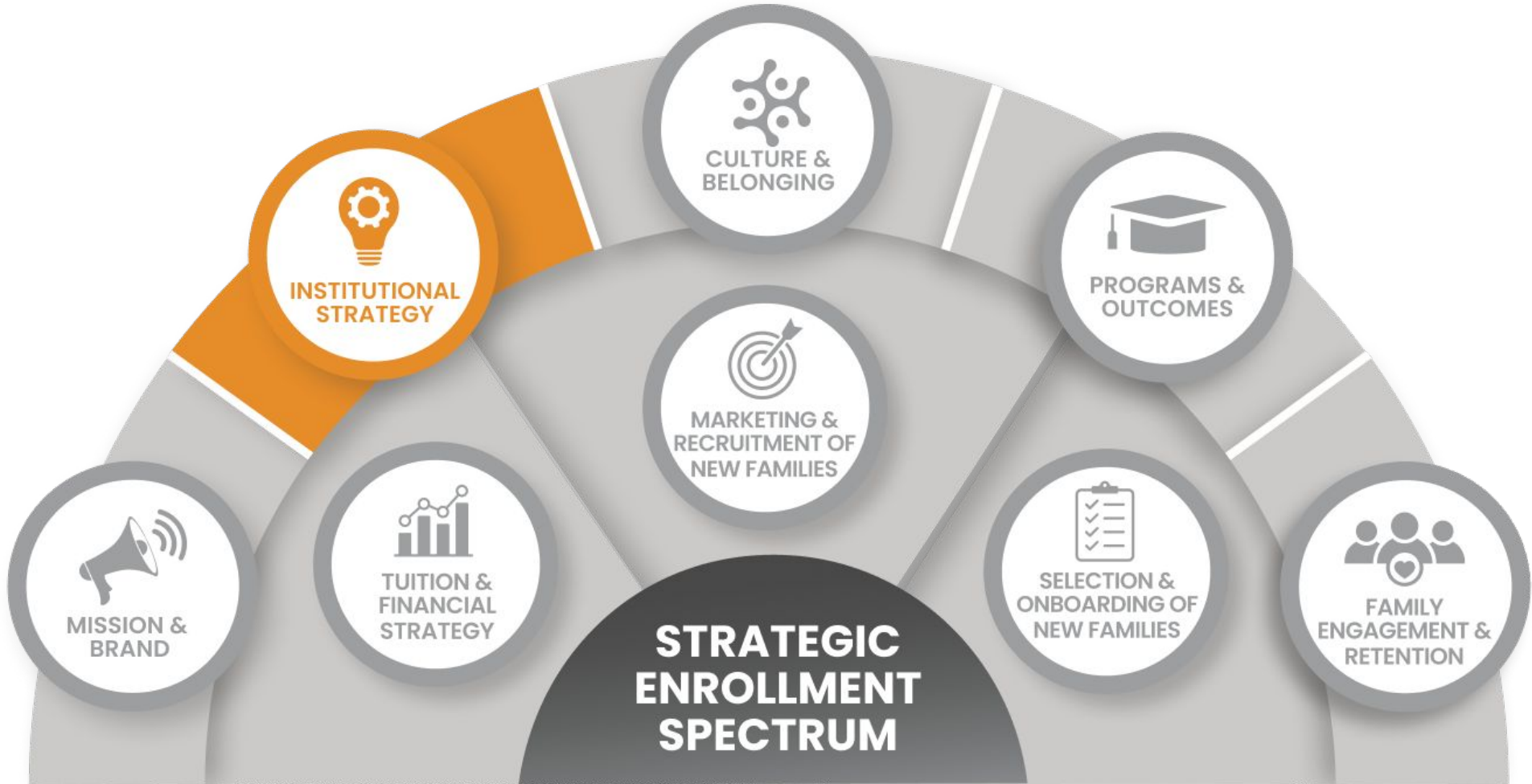
Institutional Strategy

The school balances continuity with agility.

The school considers long-term trends, measures the effectiveness of current initiatives, and seizes short-term opportunities when appropriate.

Institutional Strategy

Seek input from enrollment leader on school decisions that affect enrollment
- 54% of enrollment leaders regularly attend board meetings in 2022 (up from 34% in 2013)

Provide facts and data, not just opinions

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CULTURE & BELONGING

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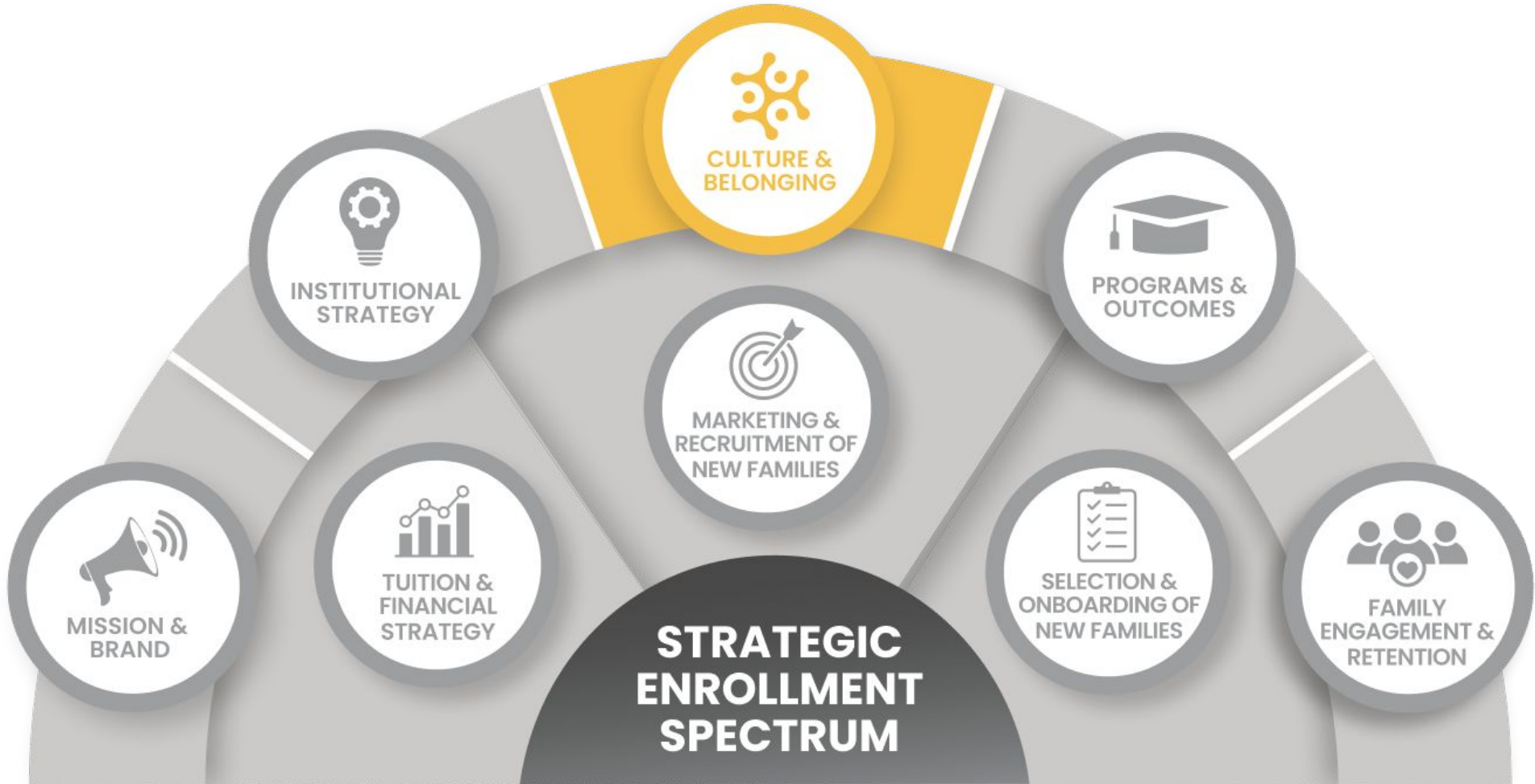
Culture & Belonging

The school lives out its values through its daily practices.

All members of the community are known, needed, cared for, have a chance to shape their environment, and can become their authentic selves.

Culture & Belonging

Know the difference - Saying vs. Doing

61% of families shared that diversity played an important role in their decision to apply to a school.

91% of families expect schools to support their child's social and emotional development.

EMA

STRATEGIC ENROLLMENT SPECTRUM

- CULTURE & BELONGING
- INSTITUTIONAL STRATEGY
- PROGRAMS & OUTCOMES
- MARKETING & RECRUITMENT OF NEW FAMILIES
- MISSION & BRAND
- TUITION & FINANCIAL STRATEGY
- SELECTION & ONBOARDING OF NEW FAMILIES
- FAMILY ENGAGEMENT & RETENTION

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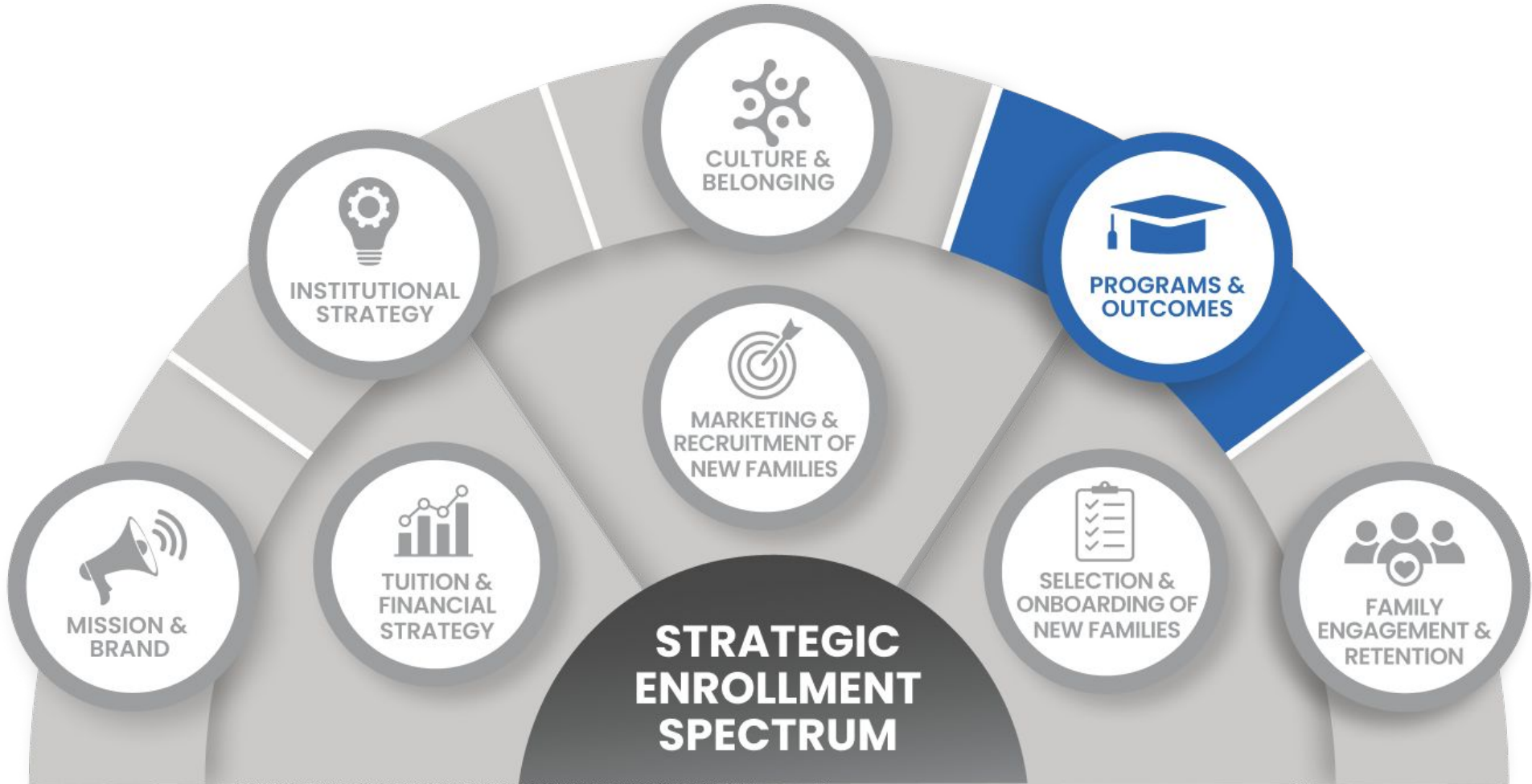
Program & Outcomes

The school delivers on its mission.

Effective academic, social, and co-curricular programs bring to life the journey and outcomes promised by the school's mission.

Program & Outcomes

Review alignment of programs with needs/wants of families

Consider prioritization of programs - breadth vs. depth; extracurricular programs are often where students feel they belong

Educate internal stakeholders

EMA

CULTURE & BELONGING

INSTITUTIONAL STRATEGY

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TUITION & FINANCIAL STRATEGY

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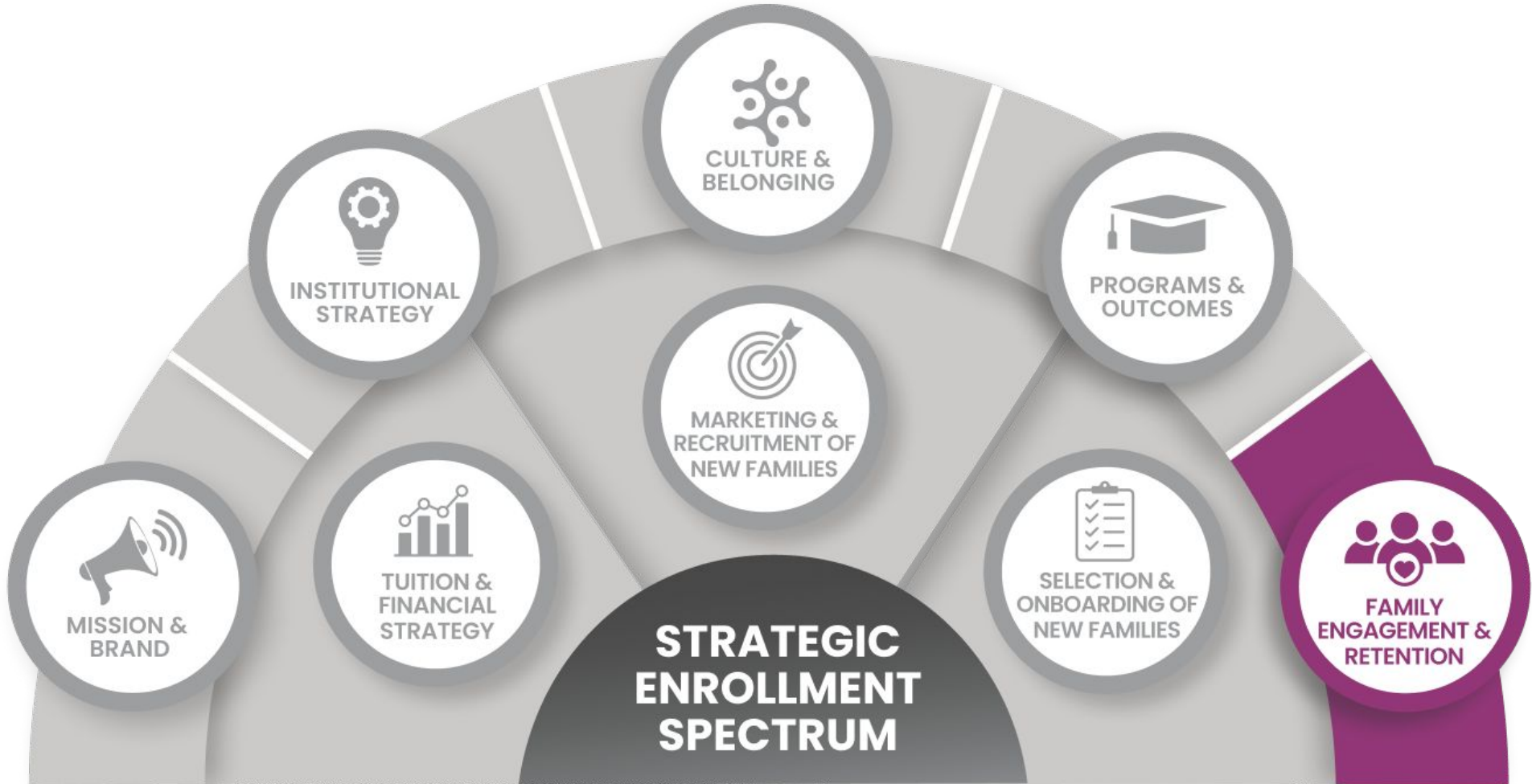
Family Engagement & Retention

Families stay until graduation.

Through both reactive and proactive strategies the school ensures appropriate engagement and retention.

Family Engagement & Retention

"The easiest student to recruit is the one you already have."

– Every enrollment leader

EMA

Core Levers

Core spectrum categories are critical to the enrollment health of the school. These aspects tend to make up the central functions of the enrollment office and their most direct partners.

The core levers require direct support from the Head of School, even when the enrollment leader serves as the primary lead.

EMA

CULTURE & BELONGING

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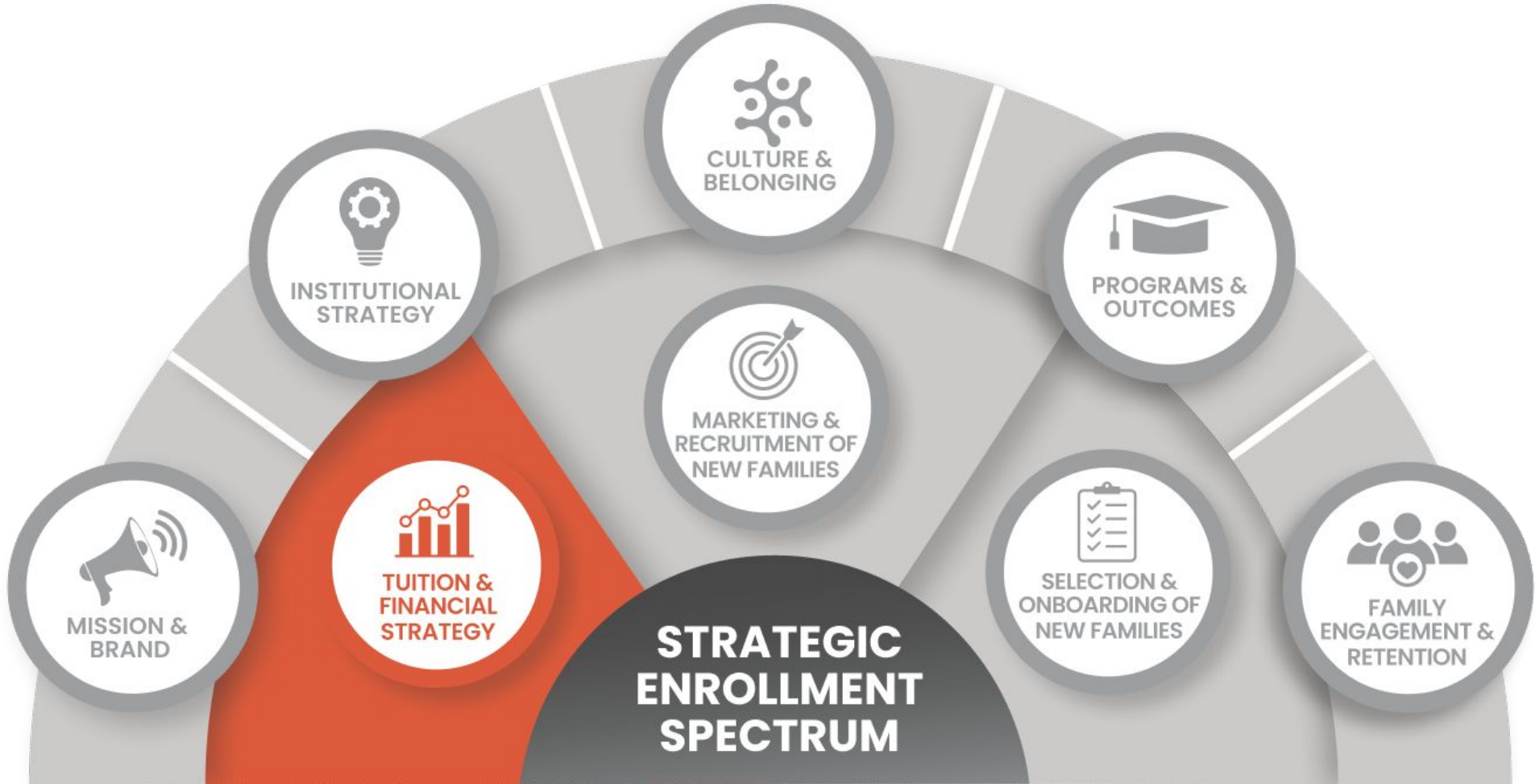
Tuition & Financial Strategy

The school uses price to help achieve its goals.

The school takes a long-term view on price, financial aid, and fiscal sustainability to ensure it continues to deliver on its mission.

Tuition & Financial Strategy

58% of families indicated that affordability was their biggest concern when applying to independent school.

Enrollment leader brings in tuition but is rarely involved in setting tuition.

Tuition increase brings financial aid budget implications.

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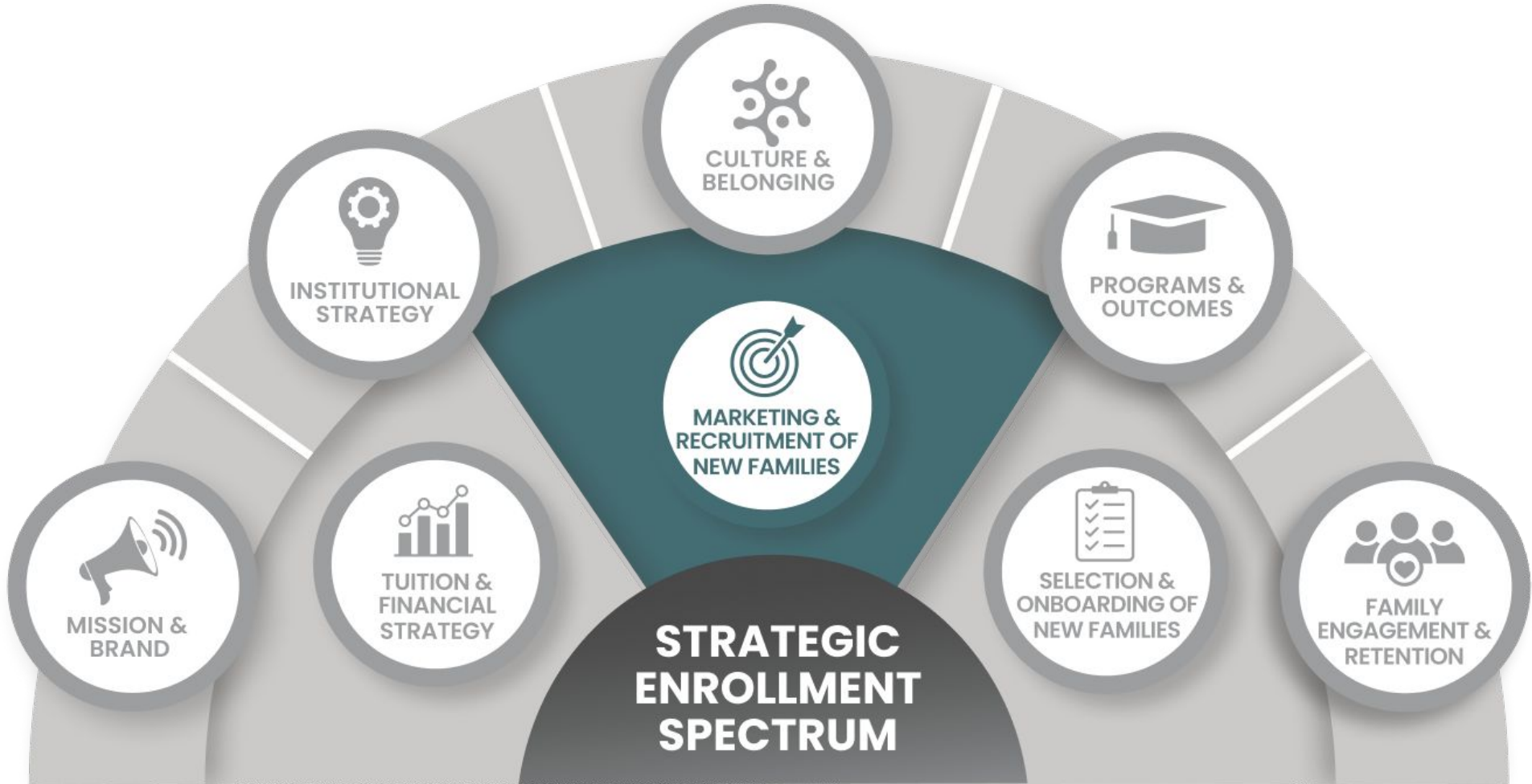
Marketing & Recruitment of New Families

The school has a robust pipeline of applicants.

The school effectively identifies and recruits an adequate number of appropriate families and stewards them through the admission process.

Marketing & Recruitment of New Families

On average, tuition accounts for 75% of a school's annual operating revenue.

Only 17% of schools spend 70% or more of their marketing efforts on enrollment.

Org chart for communications/marketing director looks different at many schools.
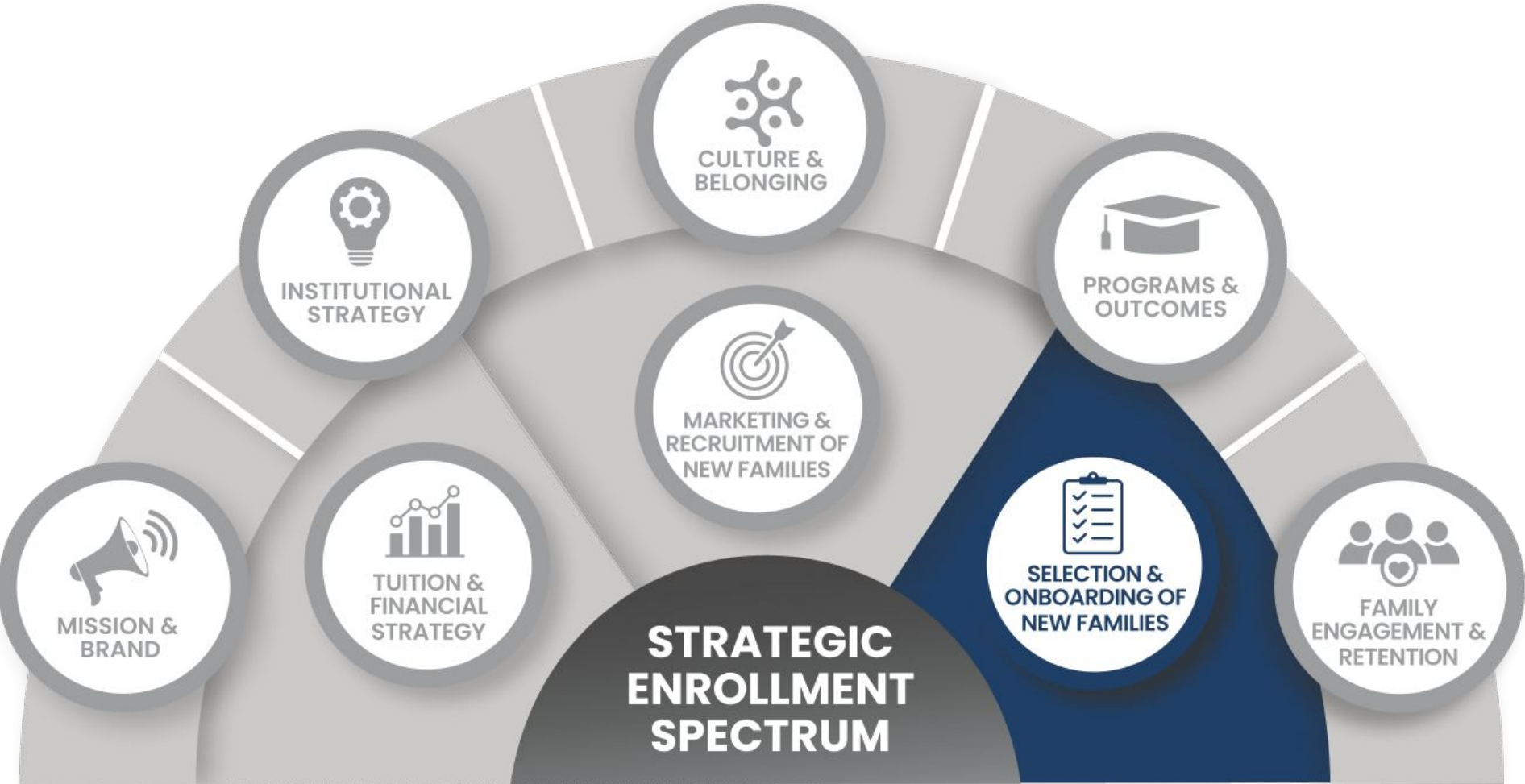
EMA
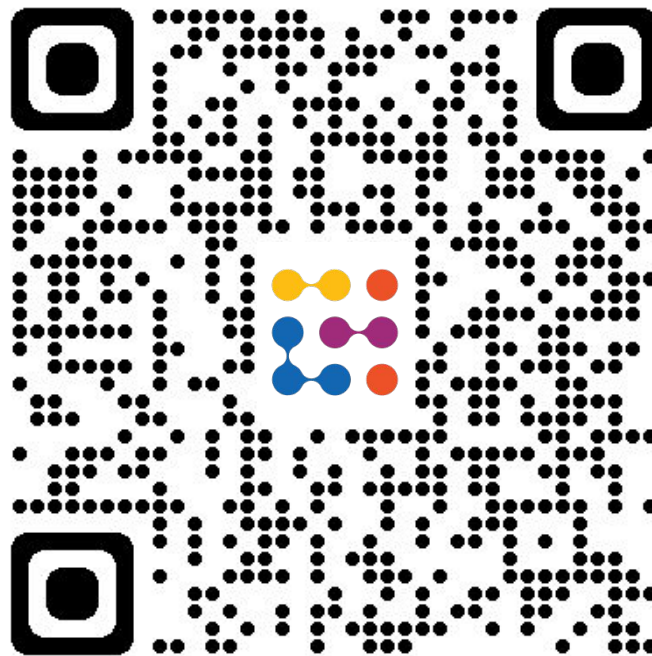
Get the full report in the EMA Community!

Key Findings

$7

in median tuition generated
for each dollar spent to
enroll a new student in their
first year.

EMA

CULTURE &
BELONGING

INSTITUTIONAL
STRATEGY

PROGRAMS &
OUTCOMES

MARKETING &
RECRUITMENT OF
NEW FAMILIES

MISSION &
BRAND

TUITION &
FINANCIAL
STRATEGY

SELECTION &
ONBOARDING OF
NEW FAMILIES

FAMILY
ENGAGEMENT &
RETENTION

STRATEGIC
ENROLLMENT
SPECTRUM

Selection & Onboarding of New Families

The school welcomes the right families to the school.

The school has effective practices and tools to determine applicant fit and ensures new families join the community smoothly.

Selection & Onboarding of New Families

We must balance our need for information to make informed admission decisions with a willingness to simplify the process for families.

54% of families apply to at least one school using a common application.

It is important that we understand the role each application piece plays in the process.

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> **"The early interactions that parents and their children have with your school are critical in establishing the quality of the experience."**
>
> — **Chuck English**

EMA

Rapid Focus Groups

Is there a particular lever on EMA's Enrollment Spectrum that you would like your school to focus on? Why?

RETENTION

ACIS Concerns for the 2021–22 Enrollment Cycle

EMA

73%
Retention of current students

38%
Continued COVID-19 restrictions

35%
Increased requests for financial assistance

34%
Decline in applicant numbers or yield

65%

of families applying to an independent school did so before the last year at their current school.

EMA

25%

of schools have a formal retention committee

EMA

Retention Committee

A team intentionally assembled
with representation across the school
to identify potential enrollment challenges
and develop a plan to address them
by delivering a first-class experience.

Retention Committee

A team **intentionally assembled**
with representation across the school
to identify potential enrollment challenges
and develop a plan to address them
by delivering a first-class experience.

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EMA

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Retention Committee Composition

EMA

Academics

Diversity, Equity & Inclusion

Business Office

Student Life

Extracurricular Offerings

Key Grade Levels

Division Heads

Begin with why families choose us

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School is failing my child.
Help me find a school that will address those obstacles so I can ensure that my child will not fall further behind and will eventually thrive in school.

My child is exceptional.
Help me find a school that will ensure my child's continued growth so he or she will fulfill his or her potential, mature, and be prepared for college.

Too many exams.
Help me find a school that will focus on my child's social and emotional development

College, college, college.
Help me find a school with an excellent academic program and outstanding reputation so I can ensure that my child gets into one of the select set of schools.

Source: National Association of Independent Schools - Jobs to be Done

Retention: Tracking

- Track the reasons students voluntarily depart the school
  - Identify what and why common threads exist. Examples may include:
    - Grade Level
    - Extracurricular Involvement
    - Transfer Schools

- While focus is on voluntarily attrition, consider any common threads among involuntary attrition.

EMA

Retention: Measuring

Measure attrition, including by grade and division level

- Compare to national and regional benchmarks, as well as school's historical attrition
  - The national and regional benchmark does not have to be our benchmark - aim high!

- Share data and discuss with retention committee members - seeing is believing!

- Short-term trends vs. consistent patterns

EMA

Retention: Auditing

Audit the effectiveness of the retention program on a yearly basis

- Ensure there is sufficient representation among student groups for whom retention has been a challenge (ex: grade level, extracurricular)

- Work with school leaders to revise and adjust retention strategies

- Don't be too hard on ourselves!

When retention is high, the job of the enrollment leader becomes easier, with fewer seats to fill and a more positive market perception.

Rapid Focus Groups

What retention efforts does your school currently implement? What new ideas would you like to see implemented?

Rapid Focus Groups

How have you educated and empowered your faculty and staff to own their role in your school's retention strategy?

Additional Resources

The 2022 Independent School
Cost-Per-Enrollment Study

Strengthen Your Enrollment Management
Strategy with New Industry Research

A Joint Report from the Enrollment Management Association, the National Association
of Independent Schools, and the National Business Officers Association

Enrollment
Management
Association

NAIS
National Association
of Independent Schools

NBOA
National Business Officers Association

2019

STATE OF THE INDEPENDENT SCHOOL INDUSTRY:
Special Report on
Enrollment Issues
and Trends

The
Enrollment
Management
Association

Survey Open Now!

Gain Access to 30+ Courses Today

Beyond Zoom

This course is designed to help you learn ways to go 'Beyond Zoom' to ensure your school's first impression on families, is its best impression.

Financial Aid Certificate Course

The goal of this course is to provide information for anyone tasked with financial aid strategy and implementation.

Introduction to Digital Marketing

A course for anyone tasked with digital marketing strategy and implementation.

Video Production Bootcamp: 7 Videos You Can Make Right Now

This course will teach you how to make seven videos to support your school admission and marketing efforts.

Admission 101 for Non-Admission Staff

Meeting enrollment goals is everyone's job. Every department in an independent school has a role to play to meet the needs of families. This course is designed for everyone working at independent schools, both admission and non-admission staff.

Advanced Enrollment Management: Partnership with Communications

The goal of this ADI mini-course is to provide a snapshot from the full ADI course, with a focus on the importance of the communications partnership.

Advanced Enrollment Management: Partnership with Finance

The goal of this ADI mini-course is to provide a snapshot from the full ADI course, with a focus on the importance of the partnership with the finance department.

Advanced Enrollment Management: Partnership with Advancement

The goal of this ADI mini-course is to provide a snapshot from the full ADI course, with a focus on the importance of the partnership with the office of advancement.

Admission Planning: The Guide to Meeting Your Enrollment Goals

Whether you are a seasoned enrollment leader or new to the field, one thing is certain, 2020 forced all of us to think even more outside the box. In this course, you'll learn tools, tips, and best practices to help meet enrollment goals.

Rethinking Enrollment Due to COVID-19

It's fair to say COVID-19 has upended everything we knew about enrollment management. This course will help you move forward!

Admissions Best Practices Certificate Course: East Asia

This online course will help admission leaders, heads of school, & deputy heads of school at international schools in East Asia learn best practices in admission. Full course details are now available.

Board Reports, Board Presentations & Managing Up

This course is for everyone seeking ways to create compelling board reports, board presentations, in addition to ways to effectively manage up.

Advanced Enrollment Management: Partnership with Head of School

The goal of this ADI mini-course is to provide a snapshot from the full ADI course, with a focus on the importance of the relationship with your Head of School.

Enrollment 101: Interviewing and Assessments

The goal of this ATI mini-course is to provide a snapshot from the full ATI course, with a focus on interviewing and assessments.

Enrollment 101: The Application and Financial Aid

The goal of this ATI mini-course is to provide a snapshot from the full ATI course, with a focus on the application and financial aid.

Enrollment 101: Boarding and Day Schools

The goal of this ATI mini-course is to provide a snapshot from the full ATI course, with a focus on events and outreach at boarding and day schools.

http://enrollment.org/LearningPass

EMA's Learning Pass

www.enrollment.org/pd/learning-pass

EMA Enrollment Toolkit

Character Skills Snapshot
Better understand your applicants and ensure a holistic admission process.

Secondary School Admission Test (SSAT)
Reliable, objective, accessible, and secure assessments.

Student Prospect List (SPL)
Reach your target audience with access to the right-fit new students.

Questions?

EMA