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Cristo Rey Network Schools: The Art and Science of Enrollment and Branding

March 19, 2009

Workshop Outline

- Overview of Enrollment Management Theory
- Positioning/Branding Your School
- Research on Parental Perceptions & Priorities
- The Role of an Admissions Director
- Using Data to Inform Decisions
- Creating/Reviewing a Marketing and Recruitment Plan



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Overview of Enrollment Management Theory

History Repeated: Boston College 1976

“Boston College, as a private university with almost total dependence on tuition income, is in a particularly vulnerable position. An unanticipated shortfall of little more than two percent of the student body would result in an immediate \$1 million operating deficit.”

To the organized, go the students

The University operates with an Enrollment Management system that utilizes techniques ranging from 'marketing' to retention studies to insure high quality and numbers of students

by John Maguire

The next decade, most experts tell us, will be one of retrenchment for private higher education. Already there are application and enrollment drops that presage belt-tightening for the prestigious, and huge deficits, sagging faculty and student morale, and possible closings or mergers for many less fortunate colleges and universities.

The ominous signs are all around us. For one thing, the national birth rate has continued to plunge at a precipitate rate, so that there will be about 30 percent fewer 17-year-olds eligible for college in the late 1980s than there have been in recent years. Even more alarming is the perception among a growing number of young people today that, with escalating college costs and diminishing payoffs in terms of guaranteed career opportunities, a post-secondary education simply may not be worth the huge investment.

Boston College, as a private university with almost total dependence on tuition income, is in a particularly vulnerable position. An unanticipated shortfall of little more than two percent of the undergraduate student body would result in an immediate \$1 million operating deficit. Six years ago, without warning, an even more serious deficit actually did occur and the reverberations from those bleak days of sharp tuition increases and a subsequent student strike are only now subsiding.

Today, all around the country, at other outstanding institutions such as the Universities of Detroit and San Francisco, as well as a myriad of smaller, weaker colleges, problems of enrollment drops, fac-

ulty cutbacks and budget crises are compounding. Within the past few months, one of the most important universities in the country, faced with an unanticipated large deficit, had to scurry for 100 additional freshmen after all notices of acceptance and rejection had long since been mailed to anxious applicants. And not all schools are so fortunate as to be able to offset such losses at the 11th hour.

But what does all this mean for this university in 1976 and beyond, into the next decade? Are we simply at the mercy of runaway economic and cultural forces that doom any optimistic vision of our future? Or can we plan in such a way as to force our fortunes to be decidedly different from others with less foresight?

Boston College takes the position that through conscientious planning and measured decision-making, we can exert significant influence over our destiny. To facilitate this, the University has undertaken during the last three years the most comprehensive long-range academic and fiscal planning in its 113-year history.

One of the major fruits of the effort has been the emergence of the concept of Enrollment Management. Simply stated, Enrollment Management is a process that brings together often disparate functions having to do with recruiting, funding, tracking, retaining and replacing students as they move toward, within and away from the University. Although these various strategies are, to one degree or another, widespread in most colleges and universities, Boston College has recently been on the leading edge of the growing movement to reduce fragmentation by systematizing and integrating these fields into one grand design.

There are five major goals of the University's evolving Enrollment Management program:

Marketing admissions

Boston College must continue to develop an admissions marketing program to attract outstanding students in sufficient numbers during a period of possible national enrollment declines.

Until four or five years ago the mere mention of the word "marketing," in the context of recruiting students, would probably have induced instantaneous dyspepsia in a faculty member or academic administrator. Now, due to a more sophisticated understanding of the marketing concept (and also because at many institutions livelihoods are threatened), colleges and universities are becoming more comfortable with this term.

The word, it must be emphasized, is not to be confused with hucksterism and slick sales techniques. Marketing is a systematic effort to merge institutional strengths with consumer (student) interests. The starting point for Boston College was the development of a long-range academic plan, which brought into sharper focus our institutional goals and objectives, as well as the specific programs that could best meet those goals. The next step becomes the identification of potential students whose interests and abilities best coincide with these offerings.

Although the admissions office is the most visible marketing agent in the University, a successful marketing effort has its foundation in outstanding programs and faculty. The task of a good admissions operation is to communicate these strengths to the student marketplace in a forthright and persuasive fashion.

In the past five years at Boston College, we have witnessed a startling increase in freshman/transfer applications, from 7,000 to 14,000. The reasons for this good fortune are many and certainly should not be attributed exclusively to better marketing. Boston College benefited and



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campus and alumni publications and is a respected commentator on national trends in university admissions.

What Can We Do?

- ❖ In response, Jack Maguire pioneered the concept of “enrollment management”
- ❖ The goal: shape your institution’s future through “conscientious planning” and “measured decision making”
- ❖ This approach laid the groundwork for remarkable success...

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Boston College Today

- ❖ Ranked 34th among national universities by U.S. News & World Report
- ❖ More than 14,000 students
- ❖ Huge growth in applications and admissions selectivity
- ❖ Top 40 endowment at approximately \$1 billion +

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What is Enrollment Management?

A process that integrates functions having to do with recruiting, funding, tracking, retaining, and replacing students as they move toward, within, and away from a school.

Hallmarks:

- ❖ Collaborate across functions
- ❖ Involve multiple constituencies
- ❖ Harness the power of the latest information technologies
- ❖ Assert strong, energetic leadership
- ❖ Diverse efforts support a coherent, grand design

Goal #1: Admissions & Marketing

To develop admissions and marketing programs to attract qualified students in sufficient numbers.

The Checklist:

- ❖ Who is responsible for admissions at your school? Is this a person or team?
- ❖ How do you involve faculty, alumni, and students in admissions?
- ❖ Do you have an adequate budget, staff, and orientation program to ensure success?
- ❖ What impression is given to people who visit your school and website, or talk to current/former students and parents?
- ❖ What mechanisms (e.g., newsletter, magazine, alumni events) do you have for communicating with key audiences? Who are your key audiences?

Goal #2: Pricing and Financial Aid

To implement pricing and financial aid strategies that will optimize the school's ability to attract and retain the desired academic and socioeconomic mix of students.

The Checklist:

- ❖ Are you satisfied that your school is priced properly? Do you sense that you are over- or under-priced relative to your market?
- ❖ Are you worried that cost related increases will soon make your school unaffordable for target families?
- ❖ Do you have any plans for reducing tuition dependence in the operating budget?
- ❖ Do you have a comprehensive financial aid policy at your school? How do you establish priorities for deciding who is eligible for limited funds?

Goal #3: Student Information Systems & Research

To create an integrated student database and a capacity to use student information systems for coordinated planning and research.

The Checklist:

- ❖ What technologies are you using to manage student information?
- ❖ How satisfied are you with these technologies?
- ❖ Which individuals know how to use them?
- ❖ Can you obtain a prompt and accurate “snapshot” of student inquiries, applications, and enrollments at all levels at all times of the year?
- ❖ In what ways do you use student data to help inform decision-making?

Goal #4: Strategic Planning

To develop a capability to anticipate immediate and long-term student interest and methods for improving the school's ability to provide for these interests.

The Checklist:

- ❖ Has your school prepared long-range (5- to 10-year) academic and fiscal plans that identify school goals and include enrollment objectives?
- ❖ How well known are these plans among the individuals who will be contributing to their success? To what extent do they have a voice in shaping the plans?
- ❖ How realistic are the plans? Do they include well-defined goals and methods for fulfillment?

Goal #5: Collaborative Organization

To organize departments/roles in a way that facilitates the coordination of staff, the flow of information, and the integration of enrollment-management decisions.

The Checklist:

- ❖ Are you satisfied with the coordination among marketing, recruiting, teaching, and fundraising at your school?
- ❖ In what ways do individuals responsible for these tasks share information?
- ❖ How do they contribute to overall success in a cross-functional ways?

How Can Enrollment Management Be Practiced at Cristo Rey Schools?

- Consider appointing an Enrollment task force to oversee institution-wide efforts.
- Develop a school-wide consciousness of enrollment as a total institutional effort.
- Value the gathering and analysis of data that enables the tracking of enrollment trends and related revenue, etc.
- Leverage the strategic value of mobilized volunteers (i.e. opinion influencers, current students, parents) to expand the reach and effectiveness of the recruitment effort.



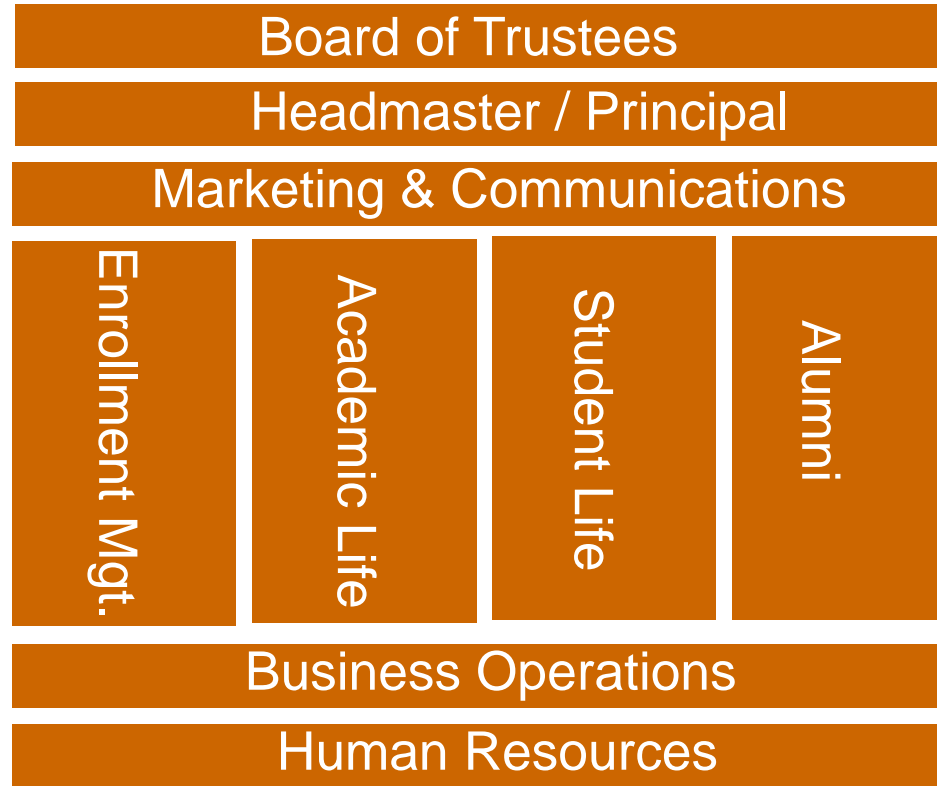
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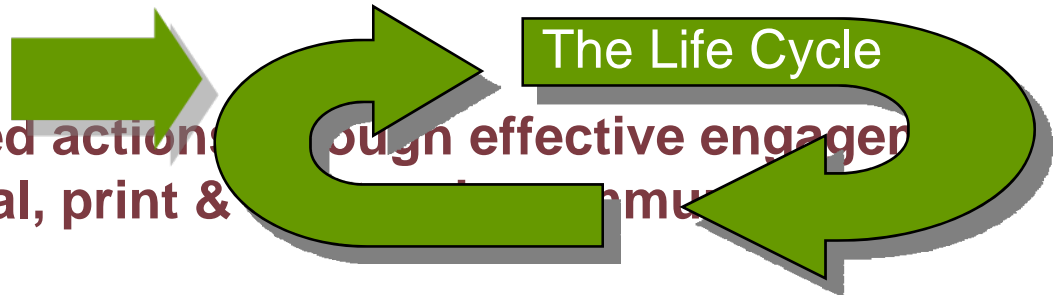
Positioning/Branding Your School

The School Life Cycle

- Prospective Students
- Parents
- School Counselors
- Current Students
- Potential Transfers
- Alumni & Friends
- Community
- Philanthropic Prospects
- Corporate Leaders
- Church Officials



Motivate desired actions through effective engagement (interpersonal, print & digital) to support the school's mission.



A View of Branding

- A name that has become a recognized carrier of authentic expectations and promises.
 - Schools, centers, programs, people.
- A set of stated or implied promises and expectations that accrue to all who “experience” a school or its offerings.
- A cornerstone upon which to inspire confidence, cohesion, and community.
- A portfolio of valuable assets to be managed.

Benefits of a Strong Brand

- Builds interest and demand.
- Fosters closer, ongoing relationships with key constituencies.
- Differentiates and positively positions the offering among competitors.
- Weathers changing conditions and crises.
- Conveys immediate value to new offerings.

Key Drivers for Branding, Positioning and Communications



Benefits to Schools

- A stronger, durable reputation and clearer positioning in the marketplace.
- Increased interest and demand leading to higher enrollment of students well matched with the school.
- Increased satisfaction/retention rates.
- Increased engagement with and support from alums and other external constituencies.
- More targeted, cost effective communications.

Positioning and Branding Cristo Rey Schools

- Who “owns” branding at a particular school? A shared responsibility – well beyond Admissions
- Consistent and strategic core messages are critical; they need to be tailored for prospective families, teacher recruitment
- Data from the experience of older schools should help to inform
- Network strategy for building the Cristo Rey brand?



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Research on Parental Perceptions & Priorities

Key Drivers for Branding, Positioning and Communications



Messaging System

– A verbal identity system through which a set of key messages (and proof points) reinforces the brand and positioning of the school in all communications.

What Are Parents' Top Priorities?

Overall, inquirers and non-inquirers place greatest importance on similar types of variables when choosing schools for their children.

Feature	Inquirer Mean	Non-Inquirer Mean	Difference
Quality of Teaching	4.85	4.79	+ 0.06
Personal Attention to Students	4.64	4.40	+ 0.24
Academic Reputation	4.60	4.50	+ 0.10
Value of Education (comb. of quality & cost)	4.34	4.40	- 0.06
Personal/Ethical Development	4.33	4.06	+ 0.27
Quality of Academic Facilities	4.21	4.22	- 0.01
Small Class Sizes	4.20	3.86	+ 0.34
Placement Record at the Next Acad. Level	4.18	4.16	+ 0.02
School Safety & Security	4.14	4.42	- 0.28

Q: Please rate each of the following features for their importance to you in choosing a school for your child.
Scale: 1 = Not at All Important to 5 = Extremely Important

School Selection Priorities (cont.)

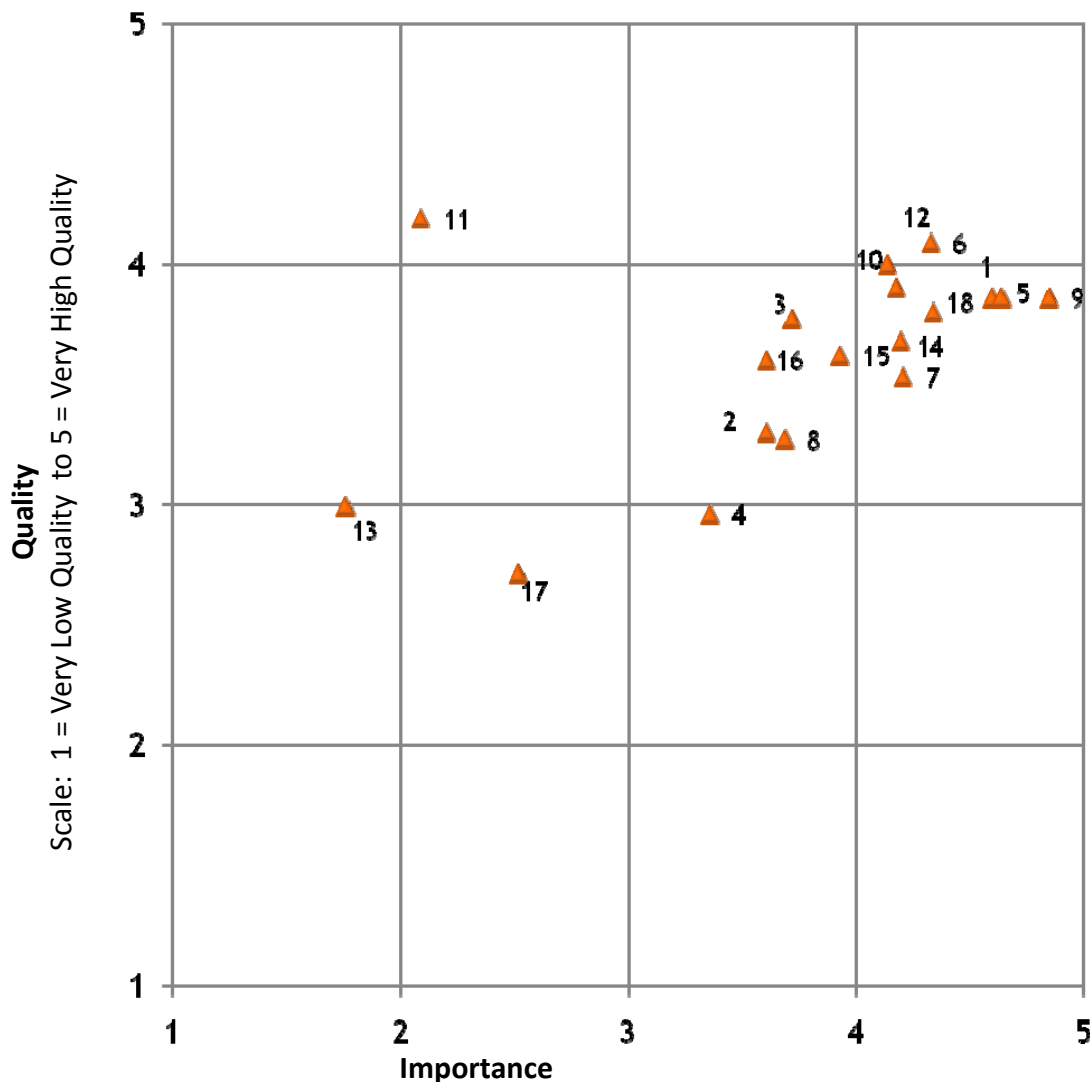
Inquirers and non-inquirers tend to place less emphasis on the features listed below.

Feature	Inquirer Mean	Non-Inquirer Mean	Difference
Student Support Services	3.93	3.98	- 0.05
Average Standardized Test Scores	3.72	3.76	- 0.04
Quality of Art & Music Programs	3.69	3.42	+ 0.27*
Athletic & Recreational Opportunities	3.61	3.53	+ 0.08
Total Cost	3.61	3.79	- 0.18
Diversity of Student Body	3.36	3.26	+ 0.10
Transportation Services	2.52	3.30	- 0.78*
Religious Education	2.09	2.11	- 0.02
Single Sex Education	1.76	1.77	- 0.01

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Feature Importance by Parochial School Quality

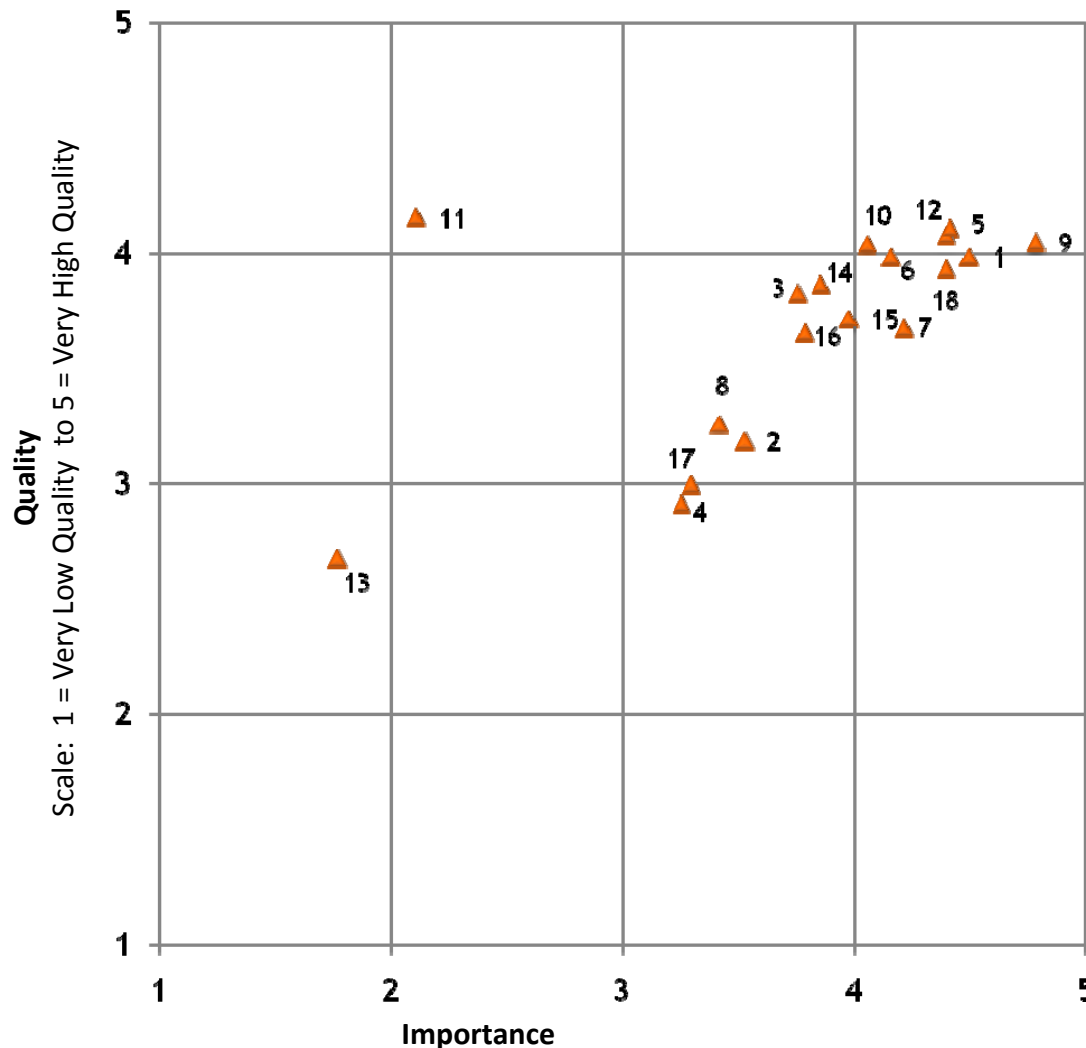
Inquirers see parochial schools as delivering better quality than public schools on the features they prize, but not as well as independent schools.



1. Academic Reputation
2. Athletic and Recreational Opportunities
3. Average Standardized Test Scores of Students
4. Diversity of Student Body
5. Personal Attention to Students
6. Personal/Ethical Development
7. Quality of Academic Facilities (e.g., classrooms, library, labs)
8. Quality of Art and Music Programs
9. Quality of Teaching
10. Placement Record at Next Level
11. Religious Education
12. School Safety and Security
13. Single Sex Education
14. Small Class Sizes
15. Student Support Services (e.g., tutoring, advising)
16. Total Cost
17. Transportation Services
18. Value of Education

Feature Importance by Parochial School Quality

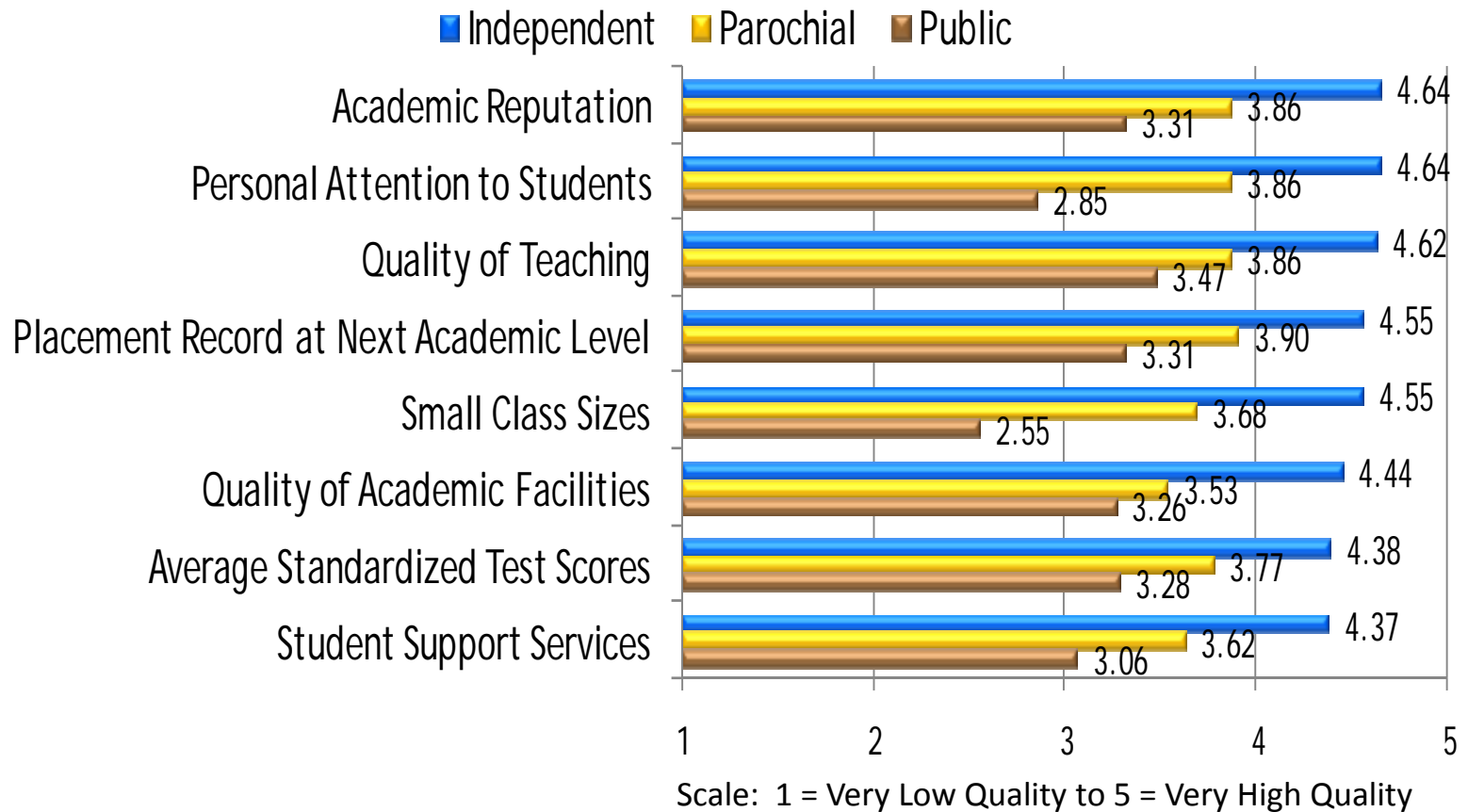
Non-inquirers show a strong degree of similarity between the importance they place on most features and their corresponding perceptions of parochial school quality.



1. Academic Reputation
2. Athletic and Recreational Opportunities
3. Average Standardized Test Scores of Students
4. Diversity of Student Body
5. Personal Attention to Students
6. Personal/Ethical Development
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17. Transportation Services
18. Value of Education

How Are Parochial Schools Rated vs. Other Types?

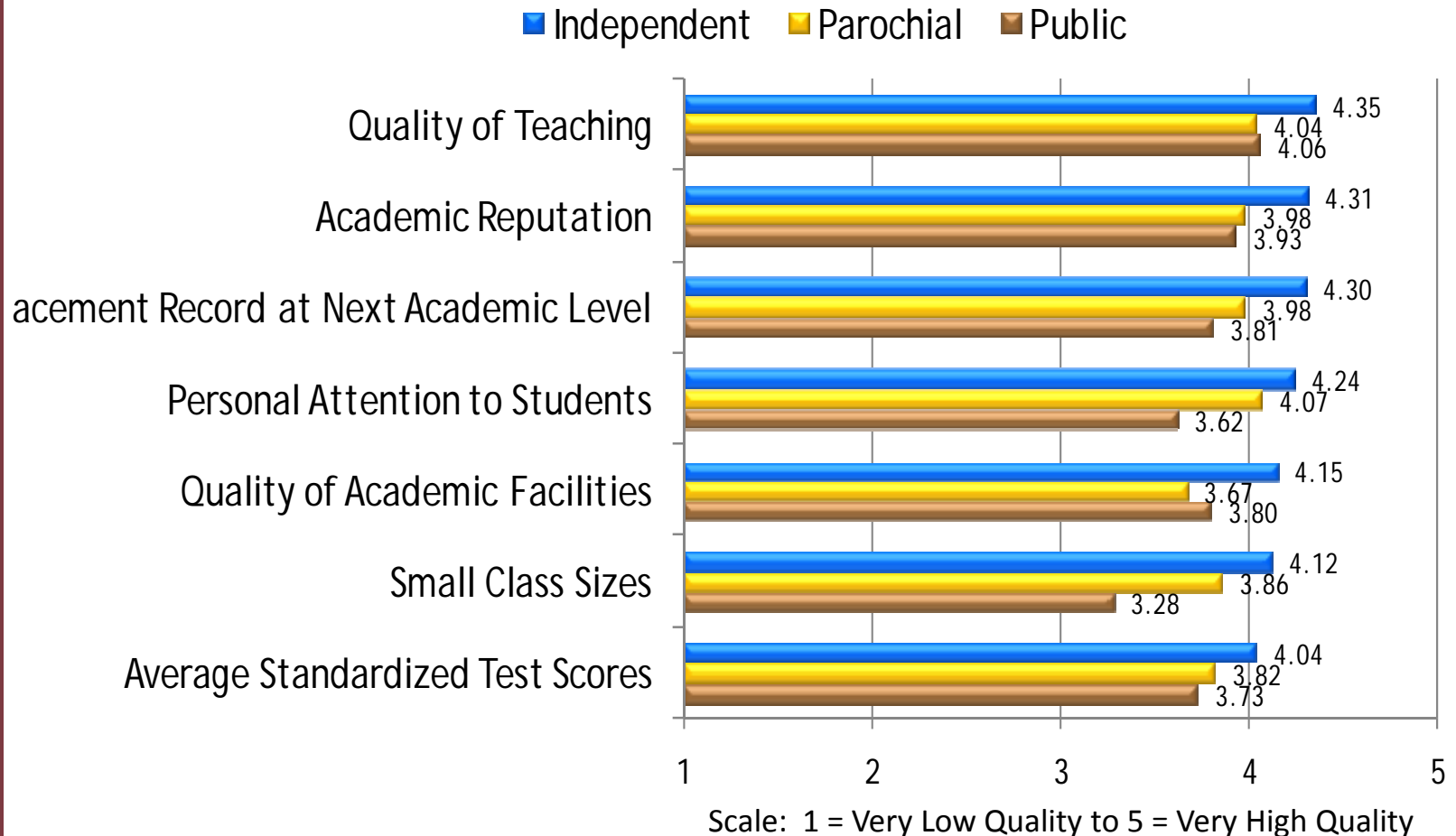
Inquirers see a clear hierarchy of quality by school type on academic features, with independent schools at the top, followed by parochial and then public schools.



Q: Please rate the quality of these features at the following types of schools.

How Are Parochial Schools Rated vs. Other Types?

Although non-inquirers tend to rate public schools higher in quality on academic dimensions than inquirers, they too assign the highest ratings to independent schools.



Q: Please rate the quality of these features at the following types of schools.



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The Role of an Admissions Director

Admissions Director Responsibilities

- Understand enrollment expectations and develop a plan to meet them
- Identify appropriate audiences for meeting goals and a plan for cultivating them
- Develop a set of recruitment messages that positions the school among the competition
- Construct an internal operations system to
 - ✓ Field and fulfill information requests
 - ✓ Track students in a database from inquiry to enrollment
 - ✓ Process, complete, and review applications
 - ✓ Schedule and organize interviews
 - ✓ Determine student selection and yield strategy
 - ✓ Organize or “hand off” orientation

Admissions Director Responsibilities

- Engage volunteers
- Create and orchestrate special recruitment events
- Monitor results and analyze data
- Report to the community
- Revise plan for the following year

Skills/Dispositions that Serve an Admissions Director Well

- Belief in the institution and its mission
- Curiosity about people
- An engaging personality
- An analytical mindset
- Strong marketing instincts
- Attention to detail and customer service
- Willingness to make judgment calls
- Sensitivity to cultural differences
- Good sense of direction

Admissions Skills and Approach Tailored to Cristo Rey Schools

- Creativity with which to market a “start up” entity
- Patience with, and a willingness to assist, families who may be unfamiliar with the admission and financial aid processes
- An interest in learning about and serving families of modest means
- Sufficient confidence to represent the admissions and marketing strategy to the faculty and other administrators



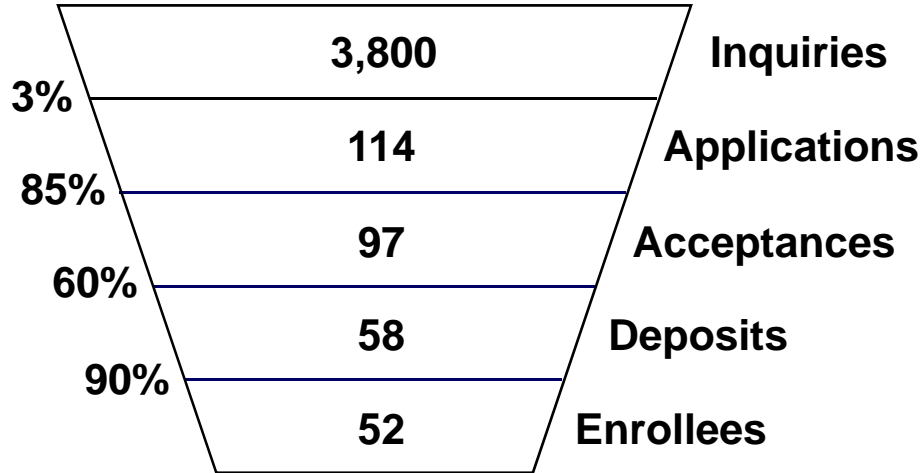
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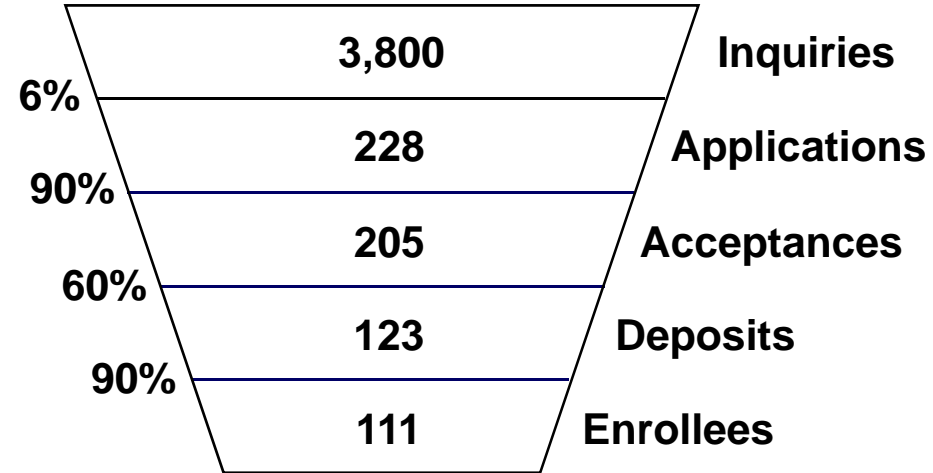
Using Data to Inform Action

Sample School Enrollment Projections New Students, Fall Term 2008

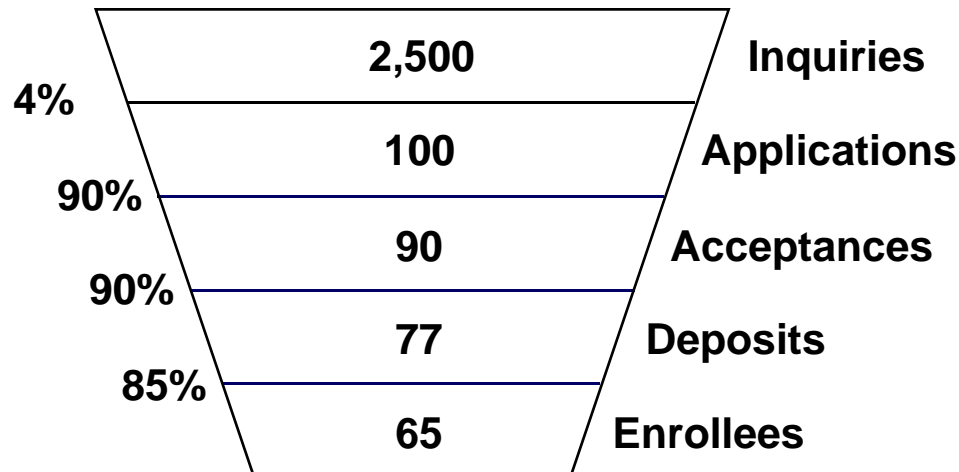
What If? Pessimistic



What If? Optimistic



What If? Realistic 2005



Data Management and Analysis at Cristo Rey Schools

- What data is regularly requested by the Network for school comparison purposes?
- Discussion of information systems and which ones are most adaptable to the needs of schools
- The use of the Network as an opportunity to benchmark conversion, acceptance and yield rates



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Creating/Reviewing a Marketing and Recruitment Plan

- **Write a five-year enrollment management plan with a one-year action plan.**

The first step in the development of a five-year marketing and recruitment plan is the establishment of clearly defined enrollment goals:

- What is the enrollment capacity of the school?
- How will enhanced enrollment help the school to achieve other goals?
- Whom are we trying to attract?
- What are our messages?
- What are our vehicles for delivering the message?

Key Elements of Action Plan

- *Enrollment goals* – The goals should be developed in collaboration with senior administrators and specify the need for all new students (freshmen and transfers).
- *Enrollment targets* – The targets should add a quantifiable dimension to the enrollment goals, including the desired number of students by age, gender, ethnicity, and geography.

Key Elements of the Plan

- *Recruitment Strategy* – Outline and integrate the specific kinds of activities intended to meet the enrollment goals and identified targets.
 - Define audiences of interest (parents, students, influential members of the community).
 - Develop marketing and recruitment strategies to inform, cultivate, and attract members of these audiences
 - Recognize importance of word-of-mouth
 - ❖ Internal audiences are critical to success of recruitment efforts.
 - ❖ Continually monitor internal indicators of satisfaction/dissatisfaction.

Key Elements of the Plan

- *Recruitment Strategy Continued*

- Specific strategies to consider:

- ❖ Building relationships with gate keepers:

- ✓ Teachers, principals, pastors, community agency staff, coaches, community organizers

- ❖ School visits and fairs:

- ✓ Designate primary, secondary, and tertiary priorities for visits

- ❖ Special events:

- ✓ Open Houses
- ✓ Cultivation events for gatekeepers
- ✓ Visibility at community celebrations

- ❖ Direct mail/advertising:

- ✓ Discuss cost/benefit

Key Elements of the Plan

- *Print and Electronic Recruitment Material* – Web presence, application forms, and printed admissions information all send important messages about the school and must help to position it in the eyes of students and parents.
- *Calendar* – Recruitment activities should be plotted on a calendar, so that the enrollment team can control the timeliness of program execution and the frequency and mix of contacts.
- *Budgets* – Calculate the estimated expense of each recruitment program within a given budget. If funds are inadequate, prioritize activities and/or lobby for additional funding. Support requests for increased financial assistance with data, and as part of a plan with quantifiable outcomes.

Key Elements of the Plan

- *Evaluation* – Assess the cost effectiveness of each recruitment program.
 - Summarize efforts
 - Link results to revenue generation
 - Determine which programs to retain and which can be discontinued to free up funds for new ventures.
- *Revised Plan* – Recommendations from the evaluation process should be incorporated into the next year's marketing and recruitment plan.

Building a Marketing/Recruitment Plan at Cristo Rey Schools

- Cross-cultural considerations in recruitment
 - Recruiters/admissions staff with different backgrounds from the target audience
 - Creating a welcoming environment
 - Expectations of/for students and parents
- Strategies for reaching families of modest means
- Sharing recruitment ideas that have worked for schools within the Network and elsewhere
- Addressing the importance of a marketing plan in winning the support of benefactors