

THE

A Spectrum of Opportunities:

Building the Foundations of a Strong Educational Journey



Bias Happens: Reduce Its Impact in Your Admissions



What Drives Parent Behaviors? Using Parent Personas to Build Relationships

Setting the Tone +

Everything from attracting values-aligned candidates to graduating world-ready individuals to the way it feels to be a student in the classroom contributes to your school's enrollment health.

> The Strategic Enrollment Management Spectrum isn't only a recipe for enrollment success, it's also a blueprint for school success.

HANS MUNDAHL

EMA's Senior Director of Professional Development

See page 6 for full article.



The Yield is a publication of The **Enrollment** Management Association

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RESEARCH BRIEF

Application and Enrollment Trends: Where Do You Stack Up?

Dear colleagues,

It's a new academic year, and with it comes that exciting sense of fresh opportunity. We've had a long and exhausting time recently with "back to school" seasons dominated by a once-in-our lifetime pandemic. The last two years of school openings have been characterized by worry about student health, safety, and learning gaps. Indeed, while we've made our way through these unprecedented times with agility and empathy, it seems we are now easing into the "next normal," returning to processes that have served us well in the past but with newfound wisdom born in the pandemic.

It is clear that the pandemic years have changed our community of independent schools. Our profession has undergone a reset, but so too have our personal behaviors, work habits, and professional networks. We've become creative with new processes and have developed deeper empathy with families who have experienced the lagging effects of lost learning or social development with their children. From a wide lens, we have also experienced macro trends that could continue to bedevil enrollment strategy for the foreseeable future, whether it be less robust international student markets, continued growth and expansion of the charter school movement, or ongoing questions about price/value related to tuition costs. Our friends at the National Association of Independent Schools (NAIS) asked me to write a follow-up article this summer to discuss predictions that I made a year ago, and if you'd like to read more on these macro topics, scan the QR code at the back of this issue to access our resource document and a link to the article.

This summer, I re-read a book that EMA trustee and serial entrepreneur Travis Warren recommended called Zone to Win. It offers insight into "organizing to compete in an age of disruption," and when I first consumed it last fall, the framework used by author Geoffrey Moore helped me better understand how to optimize for particular outcomes. He makes the point that organizations do not understand how to organize for success at a time of innovation and ongoing disruption. The book teed up EMA's "spectrum" visual, which is a rubric that has itself been "disrupted" thanks to feedback from seasoned practitioners.*

EMA's new Strategic Enrollment Management Spectrum has been re-designed to convey the interrelated work for independent school communities and the interdependencies of these areas in delivering enrollment success. Admission is just one piece of the work of enrollment management. If we do nothing else, this concept needs to be well understood inside of our schools so that every community sees a responsibility to the overall success of students enrolled in their school. We have intentionally used "Spectrum" to convey the sense of a range and sequence of the related work for strategic enrollment management. "Spectrum" has a second meaning related to light: as a "continuum of color formed when a beam of light is dispersed so that its component wavelengths are arranged in order." (That definition works too!) Many of you listen to Hans Mundahl's Enrollment Spectrum Podcast, and now you have this visual to keep as reference when hearing from experts in these key areas.

In this issue of The Yield and at our annual fall conference, EMA has decided to re-introduce the Strategic Enrollment Management Spectrum to remind you of the critical levers that drive your enrollment success. This visual should be used as a roadmap for admission and enrollment leaders (for small and large schools alike) and a framework to better understand enrollment and student success areas. This Strategic Enrollment Management Spectrum is a living, dynamic visual that should serve as a daily reminder of the many people inside of your school who work to realize your school's mission. It is also a good construct to use as your school considers its own ZONE TO WIN plan and how you will work against odds to compete in an age of disruption. To quote Geoff Moore, "Whenever frameworks engage with real-world challenges, they come away modified in some way and very much the better for it." This has been the experience of our community during the pandemic, and now we can move into our Next Normal better informed and organized for success.

Enjoy your autumn (my favorite season) and warmest regards from EMA,

Wather Moede



HEATHER HOERLE Executive Director and CEO Enrollment Management Association

*SHOUT OUT to the following people and groups for providing input on our updated Spectrum visual so that it makes sense to the independent school community: Laurel Baker Tew, Assistant Head of School for Enrollment Management at Viewpoint School (CA); Victoria Muradi, Director of Strategic Initiatives, at Durham Academy (NC); John Hutchins, Director of Admission and Financial Aid at Phillips Exeter Academy (NH); Jenna Rogers King, Associate Head of School for Admission and Enrollment at Riverdale Country School (NY); the Admission Training Institute (ATI) faculty, and the Admission Leadership Council (ALC).

Lights, Camera, Engagement! Using Digital Channels to Reach and Engage Your School Community

BY KALYAN ALI BALAVEN, HOST OF THE WHOLE STUDENT PODCAST & HEAD OF SCHOOL AT DUNN SCHOOL (CA) AND FRAN RYAN, HEAD OF SCHOOL AT BROADWATER ACADEMY (VA)

When the pandemic paused in-person interactions, school leaders were left scrambling to find innovative ways to get their messages out both internally and externally. EMA recently sat down with two heads of school to learn about their experiences and provide some key takeaways for communicating and engaging with the school community.

Making the Most of Available Resources

"When I arrived at Broadwater Academy in July 2020 during the COVID shutdown, I needed ways to connect with our internal community throughout the pandemic, to communicate needed COVID procedures, and to begin to establish myself as the new leader and shape the culture. We had no budget and limited human resources but we had Zoom," said Fran Ryan.

Ryan used Zoom to record short videos, starting with informational topics and graduated to more aspirational messages. The videos averaged 260 views—some more than 500—and viewership grew organically beyond the current school community. Ryan believes the videos played a part in engaging the community and increasing enrollment from 270 to 310 students. His advice to other school leaders:

- Get started with a low-cost platform like Zoom
- Keep the videos short and do it in one take without editing
- Post videos Friday evening or Sunday afternoon to garner the most views

Elevating the Message with Podcasts

Kalyan Ali Balaven, Head of School at Dunn School, began his podcasting journey as a guest on another podcast. He saw so much potential in the format for communicating in new ways and better reaching his school's external audience in order to generate more awareness. "In the wake of COVID, I wanted to explore opportunities to reach our external community with new technology to grow how we were communicating our school brand. Our goal was to talk about the school in a different way, create awareness, and message the whole student (versus the Dunn School) by featuring notable people speaking about the teachers who had inspired them." The Dunn School's approach has been effective with the content helping elevate the school as a thought leader.



"The Whole Student Podcast"

Listen to EMA's Enrollment Spectrum Podcast featuring Kalyan Ali Balaven.

enrollment.org/podcast

Dunn School made an initial investment of \$20k in the first year for podcast production staff and equipment. Now in its second year, the podcast has raised the independent school's profile in local and trade press, led to speaking opportunities, and contributed to growth in admissions. It even inspired a new internal student-led podcast. Balaven encourages other schools to take a similar approach:

- Choose content that makes the most of the format
- Consider promoting the communications more widely
- Be open to what's next, such as the metaverse for campus tours and virtual access

For more on how Fran and Kal used video and podcasting to communicate and promote their schools with their school community and the wider world, access the QR code at the back of this issue to access their full conversation from the EMA Heads Institute.



KALYAN ALI BALAVEN

Kalyan Ali Balaven is host of *The Whole Student Podcast* and Head of School at Dunn School (CA), an

independent boarding and day school serving students in grades 6–12 in Los Olivos, CA. Balaven champions Whole Student Education to establish a true culture of learning where each individual student can thrive



FRAN RYAN

Fran Ryan is Head of School at Broadwater Academy (VA), an independent school serving students

from Pre-K2 to grade 12 in Exmore, VA. He has served the independent school community in many capacities nationally and internationally, and is a sought-after speaker on topics of enrollment and family perspectives.



What Drives Parent Behaviors? Using Parent Personas to Build Relationships

BY RENEE DUCHAINEY-FARKES, EDUCATION CONSULTANT/COACH, RENEEPARTNERS (MA)

Parents are the ultimate decision makers when it comes to enrolling and retaining students; thereby, making the parent experience critical to enrollment. Heads of school acknowledge the value of parent partnerships for the child's as well as the parents' own learning. However, schools are often NOT actually focused strategically on these partnerships. And with the parent as the ultimate decision maker, should we be making this a strategic focus to drive enrollment?

In teaming up with a Harvard-trained neuroscience-based researcher to field an unconventional survey methodology, I've heard parents' uncensored voices. With these much deeper insights into their needs and wants in hand, we've developed significant new tools relating directly to achieving enrollment goals:



Voice of the Parents What are parent needs, wants, and hopes?



Parent and the School How do we understand the relationship parents have with our schools?

Dual Experience of the



Parents as Customers What role do parents play in the relationship?



Parent Personas: What Needs and Motivations Are Driving **Our Parents' Behaviors?** What drives the needs and motivations of

our parents in building partnerships?

1. Voice of the Parents

Through innovative research, we learned the **Voice of the Parents** reveals stunning insights for all parents, from parents of toddlers through high school seniors:

- I have hopes and desires for my precious child.
- I want to be the best parent and am anxious that I lack training or experience.
- I am anxious and worried. I need the school to help me.
- I want to have a great relationship with my child's teacher(s) and the school.
- I want to belong and be part of a community and fit in.
- I want to contribute and give back to the school.

Parents have a multitude of needs for their children no matter what age: to be a great learner; to be a critical thinker; to be happy, engaged, and loved; to have close relationships; to be nurtured; to have a strong sense of the world; and to be independent, confident, competent, supported, and connected to a healthy community. And, we know parents are worried and anxious about bringing up children, overwhelmed with "expert" advice, and not wanting to repeat their parents' mistakes but not having other models. We also know that the pandemic has exacerbated this worry in myriad new ways. Parents also have development stages in their own lives and in their parenting.

What can our schools do to hear the Voice of the Parent and to validate and support their deeper needs?

2. Dual Experience of the Parent and the School

There is a dual experience for parents in our schools; one is about the child's learning and development and the other is about the parent's learning and development. This was a breakthrough in our research. The parent experience and the student experience are together and separate. Schools must focus on the totality of this experience. Parents want to learn to be the best parent by understanding more about parenting and growth and development.

What can our schools do to support this dual experience?

3. Parents as Customers

My experience is that it is difficult for administrators/faculty to consider that parents are their customers. It's not a phrase that educators are comfortable with. I believe the parent experience is mission critical to our schools, and it creates many opportunities for us to look at the parent experience as a customer experience in our schools. Our school environments are changing, both pre- and post-pandemic. Competition and school choice, combined with rapidly evolving technology and new approaches to teaching and learning affect how our families engage and participate in our schools. A strong school culture and climate is vital to student and school success.

What can our schools do to make the Parent Experience better? How can we encourage engagement without inviting interference (boundaries)?

4. Parent Personas: What Needs and Motivations Are Driving Our Parents' Behaviors?

Parents want to be proud of their parenting, to be great providers, and to give back to their schools. Through extensive research, we mined parents' candid responses (verbatims) to their "ideal" experience with their child's school, which led us to visualizing three primary parent personas. (While there are more than three, we found it's smart to start with these three—to walk before you run.)

Participator

"I want to participate in the 'adult' aspect of the school through committees, event planning, fundraising, field trips, community events."

Collaborator

"I want to be a partner in my child's education, involved in the classroom or on educational committees and to be able to continue the learning environment at home."

Delegator

"My work as a parent is choosing the right school for my child and earning enough money to send him/her there. I want to feel secure in my child's education so I can drop them off and not have to pay attention to the day-to-day."

How can our schools use these personas to build stronger relationships with our parents and further address their needs? Or how can we customize the Parent Experience to Personas? So we close with this paradigm to ponder with your leadership team: **What if...**

- We could typify each parent early in their school experience with us?
- We could "customize" their experiences with our school?
- We could work more directly with parents about these segments (personas)?
- We found a well-intentioned way to frame each segment that parents could identify with?
- We brainstormed other ways schools could use these segments to design a better, more individualized parent experience? *



RENEE DUCHAINEY-FARKES

Renee DuChainey-Farkes, ReneePartners (MA), is a dedicated advocate for and

driver of excellence in the educational experience of students and parents. She is an adaptive leader who helps schools adapt and thrive in challenging situations. She is recognized for her success shepherding educational institutions through profound growth, as well as financial and community crises.





A Spectrum of Opportunities: Building the Foundations of a Strong Educational Journey

BY EMILY CRETELLA, OWNER, CURSIVE CONTENT

Have you ever driven over an immense bridge—maybe the Golden Gate in foggy San Francisco, or Seven Mile Bridge spanning Florida's keys—and thought, "I hope its cap and piles are secure," or, "I wonder if its cantilevers are steel or concrete"?

Unless you're an enrollment professional who also moonlights as a structural engineer, the answer is most likely no. Instead (if you're anything like me), you're probably thinking, "I hope this thing holds me up."

Conceptually, you know that a lot of work went into allowing your Jeep Cherokee to traverse open air-but what really matters to you is how all of the disparate pieces beneath you fit together to keep you safe.

The same goes for how families see independent schools. When deciding to begin the enrollment process, families don't think about your school in terms of departments and tasks. They want to know that everything works together to make your school secure and strong enough to support their child throughout the educational journey.

Yet too often, school leaders see the bridge not as a functioning whole but as a collection of individual elements—and as an enrollment leader, you may feel like you're the only one who sees how they all fit together. How do you convince someone who wants to focus on fixing the roadway if the entire foundation isn't secure?

Here at Enrollment Management Association, we understand that your role as one of the many "engineers" who hold up the school might mean it's difficult to gain all the insights and allies you need to have the impact you desire.

That's why we created the **Strategic Enrollment Management Spectrum**: a continuous sequence of elements that build upon each other to contribute to your school's health and success.



This spectrum is designed to articulate the critical work required for independent school enrollment success. It provides an overall roadmap not only for enrollment professionals but also for every school leader to demonstrate how individual impact levers affect a school's sustainability.

Enrollment is not just a single step that spans the entire student journey. It's the full, finished bridge. And because of that, you play an integral role in holding it all together.



"Right now, there are significant external forces disrupting schools' enrollment goals, from shifting demographics, to changing family expectations, to increased competition, to a pandemic, and more. The Strategic Enrollment

Management Spectrum gives schools a way to respond to those external forces, from the inside out."

- HEATHER HOERLE, EMA'S EXECUTIVE DIRECTOR AND CEO

Developed by EMA, with insights from school enrollment leaders, members of EMA's volunteer group the Admission Leadership Council (ALC), feedback from Admission Training Institute (ATI) faculty, and others, the Spectrum details the factors that are critical to the enrollment health of a school. These categories are called levers, and they fit into two parts: a core spectrum and an overarching spectrum.

- The core spectrum categories are aspects that tend to make up the central functions of the enrollment office and its most direct partners.
- The **overarching spectrum categories** are those aspects that cross multiple domains and therefore require leadership from the head of school, board of trustees, and other school leaders.



"Everything from attracting valuesaligned candidates to graduating world-ready individuals to the way it feels to be a student in the classroom contributes to your school's enrollment health. The Strategic Enrollment Management Spectrum isn't only a

recipe for enrollment success, it's also a blueprint for school success."

- HANS MUNDAHL, EMA'S SENIOR DIRECTOR OF PROFESSIONAL DEVELOPMENT

So how can a school use the Spectrum as a tool in their enrollment efforts?



"When developing the Spectrum, we wanted it to apply to any kind of school, any size, regardless of resources. It is meant to be interpretive. Schools should use it as a framework to decide where to focus their efforts, using their own

circumstances as a guide."

- JOHN HUTCHINS, DIRECTOR OF ADMISSIONS AND FINANCIAL PHILLIP EXETER ACADEMY (NH)

There are eight levers that work together to support the Strategic Enrollment Management Spectrum. By viewing enrollment management as a set of integrated components, all school constituents-including faculty and trustees-can better understand their own critical roles in the enrollment health of your school.

Here's how you can begin to use each lever to help unite various school constituents and incrementally strengthen your school's success:

Core Categories



Tuition & Financial Strategy

When net tuition and fees make up more than 75% of a school's income, tuition and financial strategy play a critical role in building enrollment success.

Schools need to take a long-term view on price, financial aid, and fiscal sustainability to ensure they continue to deliver on their mission and achieve their goals. Here are a few ways to become more strategic with your tuition planning:

- Track tuition increases over time, and compare those increases with inflation
- Measure tuition discount percent over time to ensure this number aligns
- Audit the partnership between the enrollment leader and the business officer, and ensure both are working in tandem



Marketing & Recruitment of New Families

Today, 82% of parents considering independent schools are Gen X, while Gen Y and Boomers each account for less than 10%?

This is a notable shift away from Boomers over the past three years, and marketing and recruitment must reflect these generational changes in order to build a robust pipeline of applicants. This means understanding the value your school provides and developing effective stories and messages that share this value with others.

Schools can begin to identify and recruit an adequate number of appropriate families and steward them through the admission process by focusing on a few areas:

- Track yield from inquiry to application
- Measure cost-per-tuition dollar
- Audit the effectiveness of the handoff of families from the marketing team to the admission office



Selection & Onboarding of New Families

98% of families say they are applying to an independent school to develop or maintain their child's love of learning.

This love of learning is cultivated when a student finds their right fit and when a school aligns with their unique needs and learning styles.

Schools can ensure that they welcome the right families into the enrollment process by having effective practices and tools in place to determine applicant fit, and by helping new families smoothly join the community. Here's how you can test to see if your school is successful in this area:

- **Track** yield from application to enrollment
- Measure student impact over time
- **Audit** the effectiveness of your admission criteria for predicting student success



Overarching Categories



Mission & Brand

Families are seeking schools that stand for something larger than themselves.

Among non-academic factors for selecting a school, 92% of families want their child to develop a strong moral character, and 61% say they want to expose their child to a more diverse student group (up from 55% in 2017).4

To ensure a school delivers on family expectations, all aspects of the school must be deeply and authentically connected to its mission and values—and both internal and external audiences must clearly understand that mission and those values. There are a few ways you can test to see if your school is on the right track:

- Track family satisfaction as well as external metrics such as AP/IB scores
- Measure net promoter score
- Audit how compelling and true your mission is



Institutional Strategy

With fewer births, more deaths, and uneven immigration, we're experiencing the lowest U.S. population growth since the 1930s.5

At the same time, the COVID-19 pandemic forced schools to pivot, adjust, and capitalize on new opportunities.

A strong institutional strategy can help ensure schools meet challenges like these with resilience. Resilient schools will balance continuity with agility, consider long-term trends, measure the effectiveness of current initiatives, and seize short-term opportunities when appropriate. Here's how your school can strengthen these areas:

- **Track** regional and national trends to identify parent pain points
- Measure ROI of strategic marketing efforts
- Audit effectiveness of data collection tools and processes



Culture & Belonging

91% percent of families expect schools to support their child's emotional and social development.6

Families want their child to feel a sense of belonging within the school community and to know that the school is a safe space in which to grow.

This means that schools need to live out their values through their daily practices. All members of a school's community should feel known, needed, and supported—not just those children who historically have been well-represented at independent schools, but historically underrepresented groups as well.

Students should have a chance to shape their environment and feel like they can become their authentic selves. How can your school improve on this?

- Track student stress, faculty retention, and positive parent engagement
- Measure the effectiveness of DEI efforts
- Audit your school culture, including the perspectives of historically underrepresented groups



Program & Outcomes

Families are looking for independent schools that provide a challenging education (96%), individual attention (85%), and ultimately a superior next school placement (73%)?

To meet these expectations, schools must deliver on their missions, and they must provide effective academic, social, and co-curricular programs that bring to life the journey and outcomes promised by their missions. Here's how to gauge your success in this area:

- Track student academic progress
- Measure growth of student character skills
- Audit college or secondary school counseling process



Family Engagement & Retention

The goal, of course, is for families to stay at your school through graduation. However, that cannot be left up to luck—a fact that many schools are recognizing as a priority.

Last fall, 34% of schools had a formal retention committee (up slightly from 2019).8

Schools should use both reactive and proactive strategies to ensure appropriate engagement and retention. Here's how to start:

- Track the reasons students voluntarily depart the school prior to graduation
- Measure attrition percent and compare it to national, regional, and historical benchmarks
- Audit the effectiveness of your retention program, including the partnership with the director of diversity, equity, and inclusion



"Rather than focusing on engaging and retaining new students, we need to shift our thinking to

engaging and retaining families. We cannot retain a student if we don't retain the parents and family."

- VICTORIA MURADI DIRECTOR OF STRATEGIC INITIATIVES DURHAM ACADEMY (NC)

Overall, the Strategic Enrollment Management Spectrum is designed to help enrollment professionals at all levels of their careers build the bridge between outdated admission practices and current enrollment management strategies by streamlining efforts, effectively using resources, and uniting school leaders across departments.

If you're just getting started in your career as an enrollment professional, the Spectrum can help you understand your responsibilities and how they interlock with others. Seasoned enrollment professionals can use the Spectrum to develop action plans, advocate for school-wide change, and claim a well-deserved seat at the leadership table.



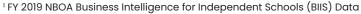
"I think this is a wonderful tool for enrollment professionals to use to start meaningful conversations with their heads of school and school leadership. It can help you demonstrate the strategy behind your decisions and allow you to make a case for allocating your resources in the best way to reach your goals." +

- LAUREL BAKER TEW ASSISTANT HEAD OF SCHOOL FOR ENROLLMENT, VIEWPOINT SCHOOL (CA)



Want more support as you apply the Strategic **Enrollment Management Spectrum at your school?**

Scan the QR code from the inside back cover of this issue for helpful resources as you make strides in improving the long-term health and success of your entire school community.



² EMA's Ride to Independent Schools 2020 Survey, Total N= 2,887



³ EMA's 2020-2021 The Ride to Independent Schools Report

⁴ EMA's Ride to Independent Schools 2020 Survey, Total N= 2,887

⁵ 2020 U.S. Census

⁶ EMA's 2020-2021 The Ride to Independent Schools Report

⁷ Source: EMA's Ride to Independent Schools 2020 Survey, Total N= 2,887

⁸ EMA's State of the Admission Industry Report 2019 & October 2021 Flash Survey

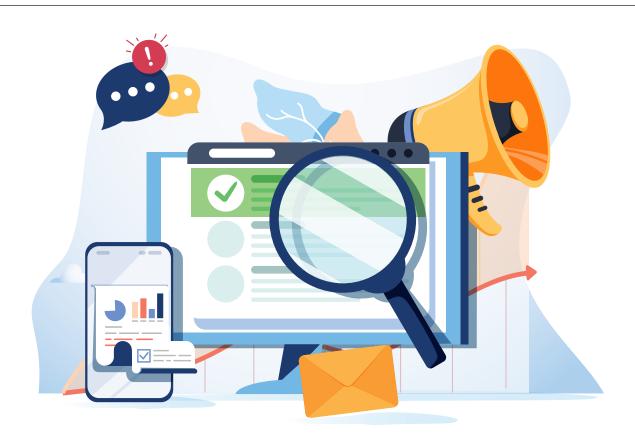


EMILY CRETELL

Emily Cretella is a strategic storyteller, content marketer, and school marketer's best business friend. The owner of Cursive Content, Emily helps school marketers tell powerful stories that attract dream families, increase inquiries and enrollment, strengthen communities, and grow school influence.

Prior to founding Cursive in 2012, Emily was the director of strategy at a Connecticut marketing agency, where she managed the execution of large-scale traditional and online marketing campaigns for clients ranging from schools and nonprofits to Fortune 500s. She now works solely with independent and private schools, colleges, and universities.





Rev Your Engines!

Marketing and Recruiting New Families Takes Off with Updated Strategies

BY HANS MUNDAHL, SENIOR DIRECTOR, PROFESSIONAL DEVELOPMENT, EMA

The road map for marketing and recruiting new families is changing. Keeping up with the shifts in expectations, approach, and communication preferences is prompting independent school leaders and enrollment professionals to take a fresh look at their strategies and, in many cases, re-route the path from inquiry through enrollment.

While the marketing and recruitment of new families is crucial for a school's ongoing success and one of the core tasks for enrollment leaders within EMA's Strategic Enrollment Management Spectrum, there is room for improvement, especially as we continue to navigate the rapidly evolving and highly competitive landscape. As enrollment leaders map out their recruitment strategies, the "true north" is this: What families care about as they make decisions about schools is changing. As a result, the way schools identify, reach out, and convert inquiries into applications must change, too.

One of the biggest drivers behind the need for change is the generational shift. Today, Gen X parents are the primary audience exploring independent school options. Eighty-two percent of parents responding to EMA's

2020–2021 The Ride to Independent Schools survey were Gen X (parents in their forties and fifties), a significant increase from 67 percent in 2017. And the number of Millennial parents (parents now in their twenties and thirties)—or Gen Y—will grow rapidly in the years ahead. As consumers, Gen X and Y are more diverse, tech-savvy, and independent compared to the Boomers who preceded them. And they bring their consumer traits to the table when they're evaluating education options for their children.

Another important indicator that marketing and recruitment strategies need a refresh is our highly competitive environment. Not only are today's families considering a wider range of educational options than ever before, but our research finds that they approach the process with an open mind. Half of parents (51 percent¹) research four or more schools, and nearly one-third report changing their first-choice school during the process.

Clearly, marketing and recruitment strategies can play a pivotal role. Let's explore steps you can take to update your road map in three key areas: expectations, approach, and preferences.

To meet evolving expectations, take a look from the outside in.

To successfully engage and recruit today's prospective students and their families, your school must stand out from the crowd. And that means applying demand-side thinking, also known as looking at your marketing strategy from the outside in. Rather than telling the story you think people want to hear, contact a few families who recently enrolled. Ask the tough questions about your marketing and recruiting messages: which ones resonated, which ones missed the mark, and what information was missing or hard to find.

Beware of generic. If your story sounds like every other school a family is considering, it won't be memorable. If your website says, "We're a caring community with strong academics and great sports nestled on a beautiful campus," that's table stakes. Instead, tell families why your school is different. Try this exercise to help strengthen your differentiators. Add the word "because" to statements in a brochure or on your website. Then, explain why. For example, "We have small classes because..." or "We have a sports program because..." Not only does adding this level of detail make your story more unique to your school, but it also connects more specifically to the needs of the students and families you're targeting. They will see themselves in your "because" statements.

Gen X and Millennial parents value authenticity and fit over a school's reputation. Focus on providing practical information that gives them the facts and figures they're looking for, as well as "softer" information like personal stories and testimonials. In other words, appeal to the head and the heart across your marketing and recruiting touchpoints. Most importantly, be consistent in both information and tone from your website and outbound emails through print materials and recruiting visits. When the end-to-end experience is in sync, your school's unique qualities and authenticity shine through.

Recalibrate internal processes to optimize external experiences.

Today's parents are busy multitaskers who are comfortable tapping into technology to help them get things done. Gen Xers and Millennials are much more likely to do extensive online research before ever contacting your school. In fact, "stealth applications"applicants whose first official contact with a school occurs when they submit their application—is now the norm. That makes your website and internal marketing processes more important than ever when it comes to generating and converting inquiries.

Start by doing a quick audit of your website activity. Look at the five pages that get the

most visits. A few may surprise you. Take the opportunity to optimize the content on these pages. For example, you're likely to find that the tuition page ranks in your top five. If you're just providing basic information, the page can work harder for you by adding elements that demonstrate the value families receive for their tuition dollars.

Then, go through your inquiry form process to get a feel for how easy it is—and where you have opportunities to streamline the experience. Make sure to try it out from your mobile device. The reality is most parents are browsing school websites and requesting information from their smartphones. With nearly one in three respondents in EMA's The Ride to Independent Schools survey saying online inquiry forms are their preferred method for showing interest in a school, you're likely missing out on potential applicants if your online form isn't simple and mobile-friendly.

Finally, evaluate your inquiries-to-application conversion rate. For most schools, this will uncover opportunities for better tracking and integration between admissions and marketing teams. For example, what happens when someone fills out the online inquiry form? Who receives the inquiry? Who respondsand how? What could be improved? But don't stop at just the mechanics. Think about how marketing and admissions can collaborate more closely. Sometimes it's as simple as sitting down to plan joint strategies, establish shared goals, and set up regular touch base meetings. EMA's Strategic Enrollment Management Spectrum provides a helpful reference tool to guide the discussion.

Recognize communication preferences with a personalized mix of outreach.

In an increasingly competitive environment, communication methods and personalization are critical. Email remains a convenient and highly effective way to reach potential families, share information, and stay in touch throughout the process. However, one-size-fits-all messages won't stand out in a crowded inbox-and if they feel too generic to parents, they could even work against you.

Tailor your messages for where the family is in the process. Did they submit an initial inquiry? Respond immediately—personalizing as much as possible based on the information captured through the form. Are they in the fact-finding stage? Share helpful insider tips about the process and aim to answer questions they don't even know they have. Are they in the consideration phase? Focus on sharing detailed information that's relevant to them and supplement email

communications with phone outreach, in-person visits, and invitations to events.



The key is to make your emails feel like personalized correspondence.

Even if you use templates as a base, tailor the information whenever you can. EMA's research, including The Ride to Independent Schools survey report, provides valuable insights into the information students and families are looking for at each stage of the process.

While busy parents appreciate the convenience of online content and emails, nothing beats word of mouth. Firsthand accounts from parents and students bring your messages to life and enhance overall authenticity. To build powerful ambassadors who advocate for your school in casual and formal interactions with prospective students and families, don't forget to focus on ongoing communication strategies that keep current and alumni families in the loop and up to speed on the school's core recruiting messages. +



HANS MUNDAHL

Hans Mundahl is Senior Director of Professional Development at **Enrollment Management** Association and has been an educator since

1995 when he first stepped into the classroom as a Fulbright exchange teacher in the former East Germany. Hans has done just about every job possible at an independent school from teacher to administrator. Most recently, Hans was the head of school at a K-8 day school in central New Hampshire. Hans's spare time is usually spent with his family, but he is also passionate about the outdoors and protecting the environment.

¹EMA's Ride to Independent Schools 2020 Survey, Total N= 2,887



Bias Happens: Reduce Its Impact In Your Admissions

BY ALEX HALLADAY DIRECTOR OF ADMISSIONS AND ENPOLLMENT MANAGEMENT. THE NORTHWEST SCHOOL (WA

We all have bias. Bias—the positive or negative associations we have with a person, place, or behavior-informs everything from whom we decide to sit with when we walk into the EMA Annual Conference to the affinity we sometimes feel when we first meet an applicant. Even though bias is natural and impossible to completely eliminate in the admissions process, it's critical to increase our awareness and understanding of how and when it occurs. When we do, we're better able to ensure that every student gets a fair, more equitable admissions process and that we admit students who are the best fit for our unique school community.

The reality is that bias can show up in nearly every element of the admissions process: a teacher who prefers extroverts writes a letter of recommendation for an introvert, an interviewer loves Star Wars and the interviewee happens to wear an Obi Wan Kenobi shirt, or a file reader advocates for the unique candidate they remember because

the student was a circus professional for six years. Think about it this way: if every interviewer, application reader, and recommender adds their perspective (and their bias) to an applicant's file, that's three opportunities for bias to impact an applicant. In a pool of 100 applicants, that makes 300 times that biased perspectives may influence your application decisions.

Having a process that mitigates bias is key for the recruitment and selection of new students, as well as the composition of the school community. When we increase our awareness and start to talk about and name our own biases, we are better equipped to recognize them and create a more impartial process that upholds the integrity of our school. It's not always easy—most biases are subconscious things we've learned from our environments over time. But with continued focus and intent, we can begin to see how bias influences our decision making and take steps to significantly reduce its impact.

Recognizing Different Types of Bias

Understanding the different types of biases and how they can show up is the first step. Kira Talent published a helpful eBook, "Breaking Down Bias in Admissions: The How-to Guide to Reducing Admissions Bias at Your School," that outlined the most commonly seen bias in the admissions process—along with examples of each. I reference this blog and the nine types all the time, plus I added one more to the list that I see a lot:

Groupthink Effect

When members of a group set aside their own opinions, beliefs, or ideas to achieve harmony.

Halo Effect

When one remarkable quality gets all the focus and overshadows other factors about the applicant.

Confirmation Bias

When you go into a situation looking to support an existing belief or opinion.

In-Group Bias

When you give preference to someone who aligns with your own group. (This is a tough one because it's so deeply ingrained. Here's a personal example: I get excited when a young woman of color steps into my office. I see myself reflected in her, and I want her to have a great experience. Owning this bias help me and my team hold me accountable and keep bias in check.)

Stereotype Bias

An oversimplified understanding of a particular type of group, person, or thing.

Conservatism Bias

When you hold on to a prior point of view despite receiving new or additional information

Bizarreness Effect

When you recall and emphasize only the most unusual information in a series of facts or details.

Status Quo Bias

When you have an attachment to the current state of being or an aversion to change (aka, the "we've always done it this way" mindset).

Recency Bias

When you give more weight or importance to a recent event or interaction than others in the past.

Presentation Bias

When the order of information being shared or the attitude of the presenter affects your perception.

Maintain awareness of the different ways bias occurs by regularly reviewing these definitions and reflecting on how they may be coming into play. Then, take action.

Reducing Bias in Your Admissions Process

Every school takes its own unique approach to admissions and is entitled to prioritize different requirements in its application process. The most important element that must be built in no matter what is consistency. Consistent processes and requirements reduce bias. For example, if you require two letters of recommendation, require it for everyone. If you require one applicant to do a second visit, require it for everyone. Or, if you give a student an opportunity to re-do their interview, give that opportunity to all students. Of course, there will be outliers, but they should be the exception, not the rule.

To me, consistency should also extend to interviews. I often see admissions officers favor a more responsive and adaptive interview where the questions change depending on the student and their responses. While it's true that this approach can help build a more personal connection, asking different questions doesn't set every interviewee up with the same opportunity. Instead, I encourage all interviews to include the same questions. Often, hearing different answers to the same question allows us to listen for the nuances and differences in how one student answers versus another.

Standardized tests can be an equalizer to help us understand students, but it's important to recognize potential bias in the process. Students do not take the test under the same physical and emotional conditions. What one student produces when they are sad is different from what another might produce, even if they're in the same room. Standardized test scores should be triangulated with other materials and considered as a part of a student's overall assessment. Take the time to understand the information you're getting from standardized test scores and what they can tell you.

Across the board, I recommend two quick things that admissions teams can do to mitigate bias in the process. First, start taking notes in the moment. Our memories are not as impeccable as we imagine and can be influenced by so many things. Taking notes reduces the chance that we (or someone on our team) will remember something incorrectly. When you are interviewing three to four students over a few days, the details can start to blend together. Alert interviewees that you are taking notes in the moment because you want to capture what they say accurately. They won't be upset; it's for their benefit.

The second immediate strategy is to make the implicit explicit. For admissions staff, that means clearly naming the "givens" in your process. For instance, are there qualities of a student that make them a fit for the school? Are there qualities that make someone not a fit? Are disciplinary flags a concern for one member of your team or everyone? Naming and defining the things we may assume creates consistency in how we evaluate applications.

Making the implicit explicit has benefits for applicants as well. By articulating the "unwritten rules," you help to level the field. For example, do you have an expectation for how a student should dress in an interview? Tell them! Interview attire means different things to different people based on their backgrounds, experiences, and identities. Perhaps the best outcome of making the

implicit explicit is the opportunity it provides to convey to families that you are doing your best to set them up for success with a fair, impartial review. I name practices that are rooted in equity when speaking with families. For instance, I tell families that we are asking the same interview questions to everyone and explain why I'm taking notes during our interview.

Leading the Discussion Around Bias

For school leaders, it's important to understand how bias applies across schools, not just in admissions work but in things like assessment feedback or hiring practices. Once school leaders create a schoolwide anti-bias culture, they empower others to name and question their own biases.

In committee, as someone who leads the group in conversation, I will name when I think my bias is impacting my perspective. By modeling vulnerability to identify my biases, I can inspire others to be more reflective too. And if I think someone else may be using a personal lens, I may ask them about it in the moment or at a later time, depending on the setting. When we know we're all accountable for identifying and naming bias as we see it, everyone can trust the process a bit more. Most importantly, having practices that educate, discuss, and call colleagues into a conversation about bias is essential to your recruitment process and in creating a balanced, thoughtful, and mission-appropriate class. +



ALEX HALLADAY

Alex Halladay is the Director of Admissions and Enrollment Management at The Northwest School (WA). She is an alum of the University of Chicago and the University of Pennsylvania Graduate School of Education with a passion for diversity and inclusion work in urban areas. Alex aspires to make change in her community through recruitment and retainment

work with students from underrepresented backgrounds and educating and inspiring cultural competency in the communities she works in.







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Reach independent school leaders, access organizations, educational consultants, and more.



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Building an Inclusive Community Through Strategic Intention

KIMBERLY BROOKER CARTER, EXECUTIVE DIRECTOR, ENROLLMENT MANAGEMENT AND DR. MIRA GAMBHIR, HEAD, RESEARCH, DIVERSITY, EQUITY & INCLUSION, BRANKSOME HALL, TORONTO, CANADA

For years, systemic racism has created a chasm of pain and injustice. At Branksome Hall, we are committed to fostering an inclusive environment for our entire school community. In 2020, with racial tensions boiling over throughout the world, we were determined to prioritize our strategic diversity, equity, and inclusion (DEI) efforts. That summer, we brought in Dr. Mira Gambhir as our new Head, Research, Diversity, Equity, and Inclusion, to lead the foundational groundwork of our DEI program. This work included both identifying our school values and the establishment of guidelines through working groups, such as our transgender student support and promoting civil discourse in our school context. Our school values of Sense of Community, Inclusiveness, Creativity, and Making a Difference guide our daily operations and are the basis for all our strategic decisions.

Our Five DEI Program Goals

Increasing DEI Awareness

Understanding and action for all constituent groups through leadership, governance, communications, enrollment management, and human resources practices by recruiting two new board members from the Black, Indigenous, and People of Color (BIPOC) community and providing regular training and updates to the Board of Governors.

Developing an Organizational Culture

Encourage advocacy, anti-racism, and anti-discrimination, and value the lived experiences of members by establishing a DEI Working Group; engaging our community in conversation about DEI at listening circles, student groups and clubs, advisor sessions, and community circles; and launching NameCoach (name and pronoun recording software) for employees and students.

Building Employee Capacity and Leadership

Continued learning opportunities to foster classroom and school operational practices that are rooted in anti-racism and anti-discrimination education with a speaker series addressing anti-racism, anti-discrimination, social action, privilege, and allyship.

Building Student Capacity for Advocacy and Leadership

Dialogue and anti-racism leadership across the school by providing new student leadership DEI training and support; establishing the Diversity Council; implementing an anonymous discrimination reporting tool; and supporting student-led co-curricular opportunities, networks, and youth conferences.

Developing Metrics, Collecting Data, and Reporting Findings

Enlist third-party firm Anima Leadership to conduct a DEI audit of Branksome Hall, featuring surveys and focus groups with key stakeholder groups. Our Principal and Head of DEI continue to report progress to the Board, Senior Leadership Team, Management Team, and student-led Diversity Council.

Outcomes

We acknowledge that the pathway to building a diverse, equitable, and inclusive community is one that is full of both learning and action. It involves falling forward, which means not seeing progress as a linear path, but rather coming together as a community to take meaningful action, respond to what we learn, and recognize our achievements. We continue to learn and remain committed to creating a culture of anti-racism and anti-discrimination at Branksome Hall. +



KIMBERLY BROOKER CARTER

Kimberly Carter is the **Executive Director of** Enrolment Management for Branksome Hall and a new Co-Chair of EMA's

Admissions Leadership Council. In her role as executive director, Kimberly oversees admissions, boarding and financial assistance at Toronto's only IB World School for girls. As a former Branksome Hall student, boarding advisor, classroom teacher, and advisor, Kimberly brings a wealth of knowledge and personal experience to the recruitment and admission of prospective students.



DR. MIRA GAMBHIR

Dr. Mira Gambhir completed an award-winning doctoral dissertation on diversity education and has reviewed curriculum and consulted on equity

and inclusion issues for non-profit and government organizations such as the Ontario Ministry of Education. She is a scholar and published author in the fields of inclusion, teacher education and global education. She holds a Doctor of Philosophy in Education from the Ontario Institute of Studies in Education (OISE) at the University of Toronto, with a specialization in comparative international and development education. Over the course of her career, she has taught across the spectrum of schooling from Kindergarten to the graduate level. Dr. Gambhir-Head, Research, Diversity, Equity & Inclusion, Branksome Hall.



At EMA, our goal is to become a catalyst for equity and access, adding lasting value to society. Delivering on this commitment, we are adding a new, standing DEI segment to The Yield to keep you—our members and partners—on the forefront of important initiatives and stories that spark inspiration and support you, your team, and our entire community in this important area of focus.

EMA Gender and Ethnicity Updates: How We Support Your Goals

EMA is committed to creating an inclusive community for our members, families, and students.

To support this goal, EMA enhanced how we collect data on our platforms. Starting August 1, 2022 families and students can now select expanded options for non-binary gender, race, and ethnicity. These changes are a continuation of a mindful integration that began with last year's introduction of the Mx. prefix options.

After receiving guidance from outside experts, EMA aligned with U.S. Census and National Association of Independent Schools (NAIS) standards for the collection of the data to improve consistency with national standards.

We also worked closely with the enrollment management software providers that integrate with EMA products to understand their requirements and ensure they will be prepared to adopt our new data fields. Through these steps, our goal is to ensure our schools receive more comprehensive data that will support their needs. Regardless of whether schools receive the data from the integration partners or the EMA Member Access Portal, all can obtain the new data in the PDF and CSV files accurately and consistently.

Parents and students can now share more specific demographic information with schools when creating their account on the EMA family portal using the following new and updated fields:

- **Parent and Student Pronouns**
- Gender
- Sex at Birth
- Race
- **Ethnicity**
- First Language
- **Faith-Based Affiliations**

The newly expanded options also will enable families to self-select their school-gender preferences and feel better represented in SAO applications, SSAT and Snapshot reporting, and the Student Prospect Lists. +





How much should we spend to enroll a dollar of tuition? What is the value of an enrollment inquiry? What is the right number of employees in the admission office? If you are an enrollment leader or head of school, business officer, or board member, you have probably asked yourself these or similar questions.



Navigating Your Financial Goals: Understanding the Data

Now more than ever, we understand that you are being asked to deliver on multiple fronts and, in many cases, are under-resourced. Your responsibilities include—but are not limited to—meeting enrollment and tuition revenue targets; advancing strategic initiatives; adapting to the dynamically changing landscape of the pandemic; and remaining the authentic and yet well-polished window into the school for prospective families.

Using a mission-driven, data-informed lens can help you better navigate these challenging times by providing you with the insights you need to have more strategic planning discussions; make the right investments in your enrollment office; and effectively spend budget dollars that result in achieving your tuition goals.

We're here to support you in achieving your strategic planning goals.

Working in partnership with the National Association of Independent Schools (NAIS) and the National Business Officers Association (NBOA), Enrollment Management Association (EMA) launched a new Cost Per Enrollment Survey. 154 professionals across all 154 schools participated in this important survey, which will help you inform important strategic decisions in the year to come, such as:

- Investment in lead/inquiry generation
- Importance of retention
- Number of full-time employees (FTEs) in the admission office
- Travel, marketing, and printing budgets
- Compensation of enrollment leaders

Early insights are revealing the emergence of seven major themes.



#1 Calculating the cost to enroll a student is important (even if it's hard).

Building capacity within the school around collaborative, data-informed decision making is important for any aspect of a school. Doing this work around the school's mission and chief revenue driver is critical. Yet we know that for many schools, the process of collecting this information is difficult. Perhaps the school understands the importance of this data but it lives within disparate systems. Perhaps the data was aggregated in such a way that made separating admission from other aspects of the school difficult. Or, maybe the school doesn't align its business practices with revenue in such a way to allow this data to be collected, broadly understood, and measured.

Key Takeaway: Leveraging benchmarking data across a number of critical areas can lead to collaborative conversations, help you align on your mission, and result in more informed decisions (particularly around revenue) to help you chart a path forward in uncertain times.



2 Informing conversations (and sometimes actions).

The report represents the first time in many years that this kind of data has been collected. As the research team prepared this report, we would often have different responses to a data point. Should the cost to enroll a student be higher or lower? How has it changed over time? What should we compare this information with? This report represents early findings and in some cases we will make recommendations as a result of the findings. More often, we'll recommend school leaders have data-informed conversations around the findings in this report. We hope school leaders will build capacity and become better data-informed decision makers as a result of this report. We also hope to continue this line of research and be able to share further findings and recommendations over time. One thing is certain, the status quo is an unsafe place. Between generational changes, shrinking birth rates, and rising income inequality, schools need to have these conversations.

Key Takeaway: Learn more about how to best use this report, and how to use it with other data sources, in the short term as we continue to provide you more to support your conversations.



The cost of enrolling a student at an independent school (as far as we know).

So what did the report find? Tap into relevant top-level numbers, including the cost to enroll a student across different types of schools and regions. We've included our methodology to help pave the way for you to perform a calculation at your own school. Additionally, compare the results from this study with other industries or sectors.

Key Takeaway: View and utilize a range of charts and tables with key data points to communicate the current state.



‡4 Enrollment management is (still) the breadwinner of independent schools.

We know that tuition makes up more than 70 percent of the annual operating revenue of most schools. This study now shows that the median return on an enrollment investment is 7:1 and that's only for one year of tuition, when most families stay at a school for many years.. It's harder to know if this is "good" or to know how to adjust our efforts over time. Although the study only considers one year of tuition, we know that most families stay at a school for many years. When we consider this factor, we are led to the conclusion that the importance of an enrollment management approach (rather than an admission-only approach) is critical.

Key Takeaway: Learn more about how admission is different from enrollment in these new findings. And how EMA's Strategic Enrollment Management Spectrum—along with the findings—can help you maximize your strategic efforts in the new year.

^{*} FY 2019 NBOA Business Intelligence for Independent Schools (BIIS) Data.





When we look at the areas that schools invest in related to admission, enrollment, marketing, and communications, we see that most schools have teams. Those teams have communication tools, and many of those teams have software to help manage their work. Many schools don't go further than this. Where else might schools invest? Inbound marketing, traditional advertising, content creation, and training are areas for consideration.

Key Takeaway: It's critical that schools that invest in their people (the largest expense), thoughtfully align their responsibilities with the latest best practices, and make sure they have the continued training to be successful.



An area for improvement may be converting inquiries to apps (or are we getting the wrong inquiries?).

When we look at the data, we see an increase in cost from the inquiry to the application. Why is this? One reason might be that inquiring is easy and families are willing to do it on a whim. If that's the case, then there are a number of inquiries that aren't serious and are disregarded. Another reason might be that schools are getting the wrong inquiries. If they got more of the right inquiries, then more of them would convert. A further possibility is that there are inefficiencies in the conversion process where families are lost. Generational changes, for example, might be changing the expectations of families when they inquire.

Key Takeaway: The acquisition of new families is a key metric for schools to track. Schools should better understand why families convert from inquiry to application, why they don't, and what actions the school should take as a result.



You can calculate your own metrics, compare them to the report, and start conversations at your school.

The most important takeaway from this report is that having data-informed conversations about enrollment at your school is important. In this section of the report, you'll be able to fill out a form to calculate your own cost per enrollment and other metrics. Schools will then be able to compare their own data with the report.

Key Takeaway: Utilize our framework to begin to have conversations about your own enrollment data.



Download the Full Study Now!

Dive deeper into the enrollment, inquiry, application, and return on investment findings by school type, size, and region. Plus, tap into additional findings around admissions, staffing, and promotional and software costs.

To download the full study, scan the QR code in the back of this issue.







enrollment.org

nais.org

nboa.org

Application and Enrollment Trends: Where Do You Stack Up?

Trend Analysis of Standard Online Applications for School Year 2022–2023

Enrollment Management Association continuously analyzes data received through our Standard Application Online (SAO) to provide members with answers to important questions and provide guidance regarding overall trends from the 2021–2022 admissions and enrollment season. Utilize a range of valuable enrollment data to help you better understand how your school's applicant composition compares to that of other schools.

How Does Your School Measure Up Against Our Findings?

- Compared to last year, total applications through April are up 1%. The increase is primarily seen in a rise in international applications, which were up 13% over 2021. This number, however, is 7% behind the same period in 2020.
- The countries from which the most international applications are coming are China, Hong Kong, Canada, South Korea, Vietnam, and Mexico. Through April, the share of the international pool that comes from countries other than this list remains at 29%, but no individual country other than those listed above represent 2% or more of the total applicant pool.
- Total cumulative international applications for PK-5th are down 49% compared to last year, 6th-8th international applications increased 17%, 9th-12th international applications rose 17%, and international applications for post-graduate programs are up 35%.

- Compared to last year, international applications were up 13% in April and domestic applications were up 3% compared to April 2021.
- Compared to last year, international applications to New England states were up 2% to date. International applications to schools in NY and NJ were down 3%, to schools in the Mid-Atlantic rose 7%, and Midwest states applications increased 2%.
- Compared to last year, there was a 29% increase in international applications submitted through April that requested financial aid. International applications that did not request financial aid rose 14% when compared to last year's figures.
- The cumulative total number of applications from China is up 5% compared to last year but trails two admission cycles ago by 38%.

EMA 2022 State of the Independent School Enrollment Report

Special Report on Enrollment Issues and Trends

EMA will be releasing its fourth report on the state of the independent school enrollment industry early next year, following editions published in 2013, 2016, and 2019. Through the report, our goal is to guide enrollment and school leaders on the path between opportunities and challenges, provide a snapshot of the industry over time to give schools a glimpse into the practices and conditions prevalent in the industry, and deliver a tool for learning and change.

Make Your Voice Heard— Take the Survey Now!

What will the 2022 State of the Industry (SOTI) research suggest about independent school enrollment? What changes will we see relative to 2019—before a global pandemic—of which school leaders should be aware? Make your voice heard and partner with us to answer these critical questions around the trends impacting independent school enrollment success.



Take the time to complete your SOTI survey.

And then take advantage of the findings when we release them early next year.



Access EMA's full end-of-year SAO Report in the member community and then download our Interactive Comparison Spreadsheet and Presentation Deck Template to share and act upon the takeaways with the rest of your school.

community.enrollment.org



Should You Stay Or Should You Go? **Navigating the New World of In-Person Events**

As we emerge from the pandemic, admissions and enrollment leaders are receiving more invitations to events. Tired of virtual meetings, many of us are craving travel and face-to-face networking. Now that we've entered a new era, today's events are a mix of in-person, online only, and hybrid.

Navigating this changed landscape can be difficult. To give you insight into current best practices, we spoke to Mary Birnie, President, Birnie & Associates, Inc., a meeting and event consulting firm based in Chantilly, VA. Here are her recommendations if you're considering traveling to an event:

BY MARY BIRNIE, PRESIDENT OF BIRNIE & ASSOCIATES, INC. (VA)





Consider the overall value of attending.

Is the city where the conference is being held somewhere you want to go? Is the content relevant and timely? Consider if recordings will be available post-conference. Also look at the list of sponsors and exhibitors to see if the products or services are of interest to your school. That said, you can't underestimate the value of in-person conversations, so take every opportunity you can to connect with your colleagues.



Plan ahead to accommodate the travel crunch.

To get the best airfares, book your travel well in advance. Schedule meetings with sponsors and faculty ahead of time as last-minute changes can be hard to accommodate. If you're hosting an event, have all the schedules and sessions posted on your website as soon as possible. Share information with your speakers even earlier.



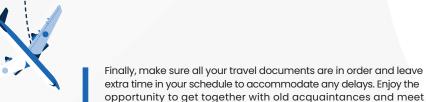
Budget accordingly.

For travelers, costs are up across the board, from accommodations to meals to airfare. For those planning a hybrid event, budget for twice the staff. Building relationships with hotel chains and creating repeat events at the same hotel can help you save on expenses.



Put strategy behind planning your virtual or hybrid events.

Listen to your audience and understand what they want out of a face-to-face or hybrid event. Those hosting events now have more virtual options available than ever before. You can choose the platform that works best for your audience and supports the experience you hope to create. Costs for internet services have risen, so build that into your budget. Keep in mind that virtual attendance may impact in-person attendance.



new friends. +



MARY BIRNIE

Mary Birnie is the President of Birnie & Associates, Inc. (VA). For more than 20 years, Mary and her team have been coordinating meetings and events that meet strategic goals and make guests feel welcome.

Retention: 6 Pillars of Success

BY MICHELLE ULLAND, DIRECTOR OF ADMISSION AND ENROLLMENT, MINNEHAHA ACADEMY (MN)

Retention starts during the admissions process and continues through graduation and even beyond. At Minnehaha Academy, a Christian college prep school in Minneapolis, we like to think of it this way: If you're part of mission promise, you must be part of mission delivery, and that means focusing on retention within day-to-day experiences, not just at certain times or major events.

I'm a full-on geek about admission and retention. I got interested in admissions in college and got my undergrad degree in communication studies. I followed that up by earning a master's degree, where I studied retention through the admissions process. During an internship at a pretty intense for-profit college, I focused on applying communication theory to the retention process from inquiry through enrollment. From there,

I worked in a few different admission roles, including higher ed and a startup company that marketed certificate programs, before moving to the K-12 sector.

In 2014, I joined Minnehaha Academy as the Director of Admission and Enrollment. Based on my studies, past career experiences, and current role, I see six pillars that drive successful retention strategies







#1 Share your valuable information.

Throughout the admissions process, you're focused on getting to know the student and the family. By the time they enroll, you understand their interests, challenges, and even their personalities. You need to make sure that all of this beautiful, valuable information doesn't disappear after the student shows up for the first day of school. Pass on what you know to the head of school or principal, teachers, counselors, head of transportation, or school nurse. It's not about sharing everything; it's about ensuring the right people have the right information to help create the best experience possible for the student and the family.

#2 Be in the weeds.

When I first started as admission director, it felt a little bit like I was trying to get up in people's business because I needed to know what was happening once kids enrolled—who's in trouble, who might not come back, and who is super happy. I had to learn how to work with principals to establish information-sharing that demonstrates why I need to know some of what they know. Now, I meet with my principal every two weeks to share information. I call it being in the weeds.

Refer or defer.

Because of the relationships we build with kids and their families during the admissions process, they know and trust us. That's why it's so important to be present, in the pick-up and drop-off line, at school carnivals, or at sporting events. People will see you and your team in these settings and tell you how things are going, good and bad. Then, you have to know what to do with the feedback, so they feel heard and know what's going to happen next. Sometimes it's just about listening and deferring. Other times, it's something that needs to be referred to the person who can address the concern.

#4 Communicate your support for leadership.

As you take in feedback, it's critical to communicate your trust and support for the leadership of your school. If a parent shares a concern that's outside of your lane, you need to listen and then express your support for your leaders' decisions. Ultimately, retention relies on the students' and parents' belief in the school's leadership. For example, in 2017, there was a terrible gas explosion on Minnehaha's campus over the summer. As a result, we didn't know where we would be holding our upper school classes in the fall. When families expressed concern and were considering other options, my message was to convey that while I didn't have the answers, I trusted the people making the decisions. It makes a big difference.

#5 **Build retention in the little moments.**

I used to say that parents won't pull happy and engaged kids. Now, I add to that: Parents need to be happy and engaged too. The best retention strategies take place in everyday moments. I go through the school calendar and identify events, like a soccer match or a play. Then, I invite a class and their parents to attend the event. Sometimes people just need you to tell them where to show up in order to get involved. Plus, by inviting younger kids to a varsity sporting event, they—and their parents -see their future. Another little thing that works is to snap a child's photo on an ordinary day at school and text it to the parent. Every parent loves a picture of their kid, and it reminds them of the great investment they're making in their child's future.

#6 Cultivate positive stories.

You can have the best retention strategy in the world, and people are still going to leave. You have to focus on the story they will tell others about their experience. You want to make sure that even when families decide to leave, they feel like they were heard, understood, and have a positive view of their time at your school. We ask families who don't enroll two bold questions. Would they ever consider returning? And will they refer other families to us? Roughly 85 percent say yes. That means they went through your whole process and would do it all again. To me, that speaks highly of your school and its ability to retain students.



MICHELLE ULLAND

Michelle Ulland is the Director of Admission & Enrollment at Minnehaha Academy (MN). She brings 15 years of admissions experience from all levels of education. She is a member of the EMA Admissions Leadership Council and has been a presenter with EMA, ISM, and AISAP.

Squad Goals: Building Productive Team Retreats

BY KATHY LABRANCHE, EXECUTIVE DIRECTOR OF STRATEGIC ENROLLMENT MANAGEMENT, TRINITY COLLEGE SCHOOL, ONTARIO, CANADA

Creating a meaningful team retreat takes planning and effort. As an enrollment leader, you want to ensure that the time you spend away from the office will have a positive impact on your goals for the school year. I love approaching things in different ways and having a meeting theme to ground our work.

At Trinity College School, we have weekly meetings throughout the year and a summer retreat of some sort annually. Sometimes, we have a mid-year retreat to look at practices, protocols, anything that's shifting, particularly if we've taken on a new initiative that year (like a new database).

For a while, COVID halted our travel and turned many of our practices upside down, so in March 2022, we thought it was time to dig deep into where we wanted to land postpandemic. We also introduced a new database mid-pandemic and had new staff to bring on board. We wanted to reflect a little and celebrate making it through the last two years with the full school.

As I debated the theme for our meeting, I saw The Yield magazine with all these wonderful words: reflect, rebuild, reconnect, recommit. I thought, "That seems like a really fun and creative way to put the lens on how we talk about what we do on a daily basis and how we go forward from here."

They were good words. Recommit—that's a great word. It's like, "We do this well and we need to lean into it more; we need to recommit to it fully." I found fun graphics and created signs with each of the "re-" words to put around the room. We had sticky notes and colored markers. It was tactile engagement, which is more interesting than just sitting around a table.

We went through two exercises to think about those words and what we do on a daily, monthly, and annual basis. First, we followed the customer journey, walking through the steps they would take, how they would engage with us, and things they might encounter during their process. Ultimately, admissions is about ensuring that we meet and support our families as they move through the process of learning about our school.

On the other hand, we understood that by only looking through the customer lens, we would miss a lot of the behind-the-scenes work that isn't part of the customer journey but influences that journey, like retention, data collection, event planning, and marketing. Collectively, we worked through our individual job responsibilities and used the same framing to evaluate the work we do in service of the mission.

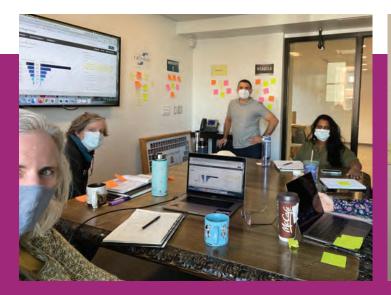
Having the theme gave us a positive spin on our work and helped us see the process differently. It gave us a lot of ideas to work through in the days ahead and was a good team-building opportunity. The work we did in March helped to meaningfully populate our weekly agendas for the next four months as we continued our focus on being reflective enrollment management practitioners.

I highly recommend creating a meeting agenda around a theme so you can be more authentic and intentional during your conversations. Also, get away from your usual workspace and set guidelines, like no computers or technology during the meeting. This sets the tone and allows for more creativity. It makes it feel different from an ordinary day. +



KATHY LABRANCHE

Kathy LaBranche is the **Executive Director of** Strategic Enrollment at Trinity College School in Ontario, Canada.







All Aboard: Hopping Back Into a Boarding School Model

BY KIM NGUYEN, DEAN OF RESIDENTIAL PROGRAMS, 'IOLANI SCHOOL (HI)

Founded in 1863, 'Iolani School has a rich and diverse history. Deep within that history is the fact that 'Iolani started as a boarding school and offered boarding through 1959. In the decades since, our Honolulu-based school continue to grow in both reputation and size to become a well-respected K-12 day school with more than 2,100 students. Then, in 2018, 'lolani implemented a new element of our strategic plan that brought back a piece of school history we welcomed our first group of boarding students in nearly 60 years.

In some ways, the task was monumental. In others, it was an easy transition. With all the unpredictability and challenges of the pandemic, we've had a chance to learn and adjust. It has definitely been an adventure. Based on our experiences, my top advice for schools looking to add boarding is:



Focus on the why.

This helps with marketing and building a strong pipeline of applicants. Hawaii is not the typical area you think of for boarding school. For us, boarding extends the opportunity for an 'Iolani education to students beyond Hawaii. From the beginning, our focus has been to keep the number of boarding students intentionally small to allow us to really get to know and support each student.

Be mindful of the culture shift required.

Boarding requires shifts in culture and mindset-and a commitment to integration between day school and boarding students. Most importantly, keep in mind that you won't have everything figured out in year one. I've been delightfully surprised to find an amazing network of other schools and people willing to share insights and advice. Looking ahead, I'm excited to be a resource for schools and admission directors as they build out their boarding strategies.

Educate the community.

This creates trust and loyalty. During our first year, we had no dorms, so students lived in faculty and staff housing while dorms were built. When the pandemic moved us into virtual learning, our boarding students returned home or moved to homestays due to travel restrictions. Even when our school reopened in September 2020, many of our boarding students continued virtual learning until they were able to return to Hawaii.

Through all the ups and downs, our number of boarding students has increased-from our first group of 34 high school students in 2018 to 90 boarding students starting the 2022-2023 school year. We've also been able to tap into our strong international alumni network and proximity to Southeast Asia, which, combined with the school's unique culture and reputation, has helped us attract a diverse group of students.



KIM NGUYEN

Currently serving as Dean of Residential Programs at 'Iolani School, located in Honolulu, Hawaii,

Kim Nguyen has led efforts to develop and grow the recently reinstated boarding program for grades 9-12. Prior to joining 'Iolani, Kim served as Director of International Recruitment and Support at her alma mater, Muhlenberg College in Allentown, PA. Under her leadership, Kim established an international student program and grew the international student population from 6 to 78 students from 15 countries in 3 years. Before her career in admissions began, Kim taught ESL in Ho Chi Minh City, Vietnam, for three years, which is where she credits the origin of her love for international education.

Character Matters:

How to Recruit and Retain Families in a Saturated Market

BY LAURA S. TROTT, DIRECTOR OF ADMISSION, LAUSANNE COLLEGIATE SCHOOL (TN)



Lausanne Collegiate School is the only PK2-12th grade, International Baccalaureate, and non-sectarian independent school in the Midsouth. The core values of the school, outlined as The Lausanne Way and the International Baccalaureate Learner Profile, set a foundation for the school's Portrait of a Graduate. The Social-Emotional Learning Program is a vehicle for continually reaffirming these values and consistently approaching the development of these characteristics and attributes.

Lausanne has long had counselors dedicated to each division that help support faculty and staff in focusing on the whole child's growth and development, in addition to their academics. More than a decade ago, the Middle School counselor and administration, with the support and assistance of the faculty, created a platform that could engage this age group through regular self-reflection and community-building exercises.

Parents were stressed and looking for ways to help give their children tools to become self-advocates and boost independence through their educational journey. The Middle School's goal was to help students build communication and social skills and focus on self-management as a part of the International Baccalaureate Middle Years Programme. With an outline provided by the counseling office, the faculty began the implementation of mindfulness activities held at the beginning of each class session.

"Mindfulness helps you focus on the present moment to help clear distractions," Madison '27 shared. "When we first get to our class, we just breathe so that we can focus and get ourselves and our mind together to really do our best. It teaches us that if we're stressed, we just need to breathe and get that moment of silence to control ourselves. It lets us control our emotions and thoughts so we can hone in on what we're trying to do."

"The breathing exercises we do during the Mindful Moment before each class help you become mentally aware," Naji '25 shared. "It makes you feel grounded in the present moment and clears distractions."

In 2019, the "Daily Focus" was developed at Lausanne to expand the social and emotional skills even further. Students begin each day by meeting for ten minutes in their advisories for activities that foster self-reflection and vital self-management skills. Each morning, students spend 10 minutes before class starts to do mindful activities and learn more about how their minds process information.

"During the Daily Focus, we learn about life and how we can be better individuals—for example, we focus on a specific topic for the week like empathy and sympathy," Reese '27 shared. "I have learned how to react to the situation while being mindful of other people and how they feel."

Learning to control her breathing has also been a benefit to Reese.

"One exercise is to breathe in for 5 seconds, hold for 1 second, and breathe out for 7 seconds," she continues. "I use it in volleyball to focus on my serve rather than the crowd or looking at my coach."



PHOTO ATTRIBUTE: SHAYNE FICK



LAURA S. TROTT

Laura S. Trott joined the Lausanne Collegiate School (TN) staff in 2010 as the Director of Marketing & Communications, working closely with the admission and advancement offices. After several years of sharing Lausanne's story

through the website, school publications, and media contributions, Laura transitioned to the admission office in 2013 as the Director of Admission, providing her the opportunity to play a more active role in sharing Lausanne with prospective families. Before joining the Lausanne team, Laura served for over a decade as a communications and marketing specialist for non-profits in the Memphis area after graduating with a BA in political science from Rhodes College and the McIntire Business Institute at the University of Virginia. Laura and her husband, Andrew, are the proud parents of Lausanne students Abby '24 and William '27.

The successful establishment of a Social-Emotional Learning Program in the Middle School led to its expansion schoolwide and includes five main focuses as identified by Collaborative for Academic, Social, and Emotional Learning.

- Self-Awareness-Understanding our strengths and limitations helps us develop a well-grounded sense of confidence and optimism. If students develop the ability to understand their emotions, they can begin to see how emotions impact thoughts, and influence behavior.
- Self-Management-Students need to learn how to regulate their emotions, thoughts, and behaviors in different situations. Students at Lausanne learn to manage stress and control impulses, including setting and working toward personal and academic goals.
- Social Awareness—Lausanne's student body represents over 75 different countries. As a global community, students develop the ability to understand and empathize with others from diverse backgrounds and cultures.
- Relationship Skills—Learning how to have positive, social relationships and work with others is essential to developing into a healthy adult. Students are encouraged to practice communicating clearly and listening actively. They learn to cooperate, resist inappropriate social pressure, negotiate conflict constructively, and seek and offer help when needed.
- Responsible Decision-Making-Helping students develop the ability to make positive choices at school builds their ability to make responsible decisions on their own. To do this, they need to have realistic evaluations of the consequences of their actions and be mindful of the well-being of themselves and others as they make decisions.

As in the Middle School practice, teachers in Lausanne's Lower School introduce SEL to students throughout the day. Students can participate in Mindful Moments as they make transitions in classroom activities and rotate through co-curricular classes such as art, dance, music, language studies of Mandarin and Spanish, physical education, or A.N.T.S. (Acquiring New Technology Skills).

"It's precious to see two-year-olds doing their breathing exercises and yoga during their Music and Movement classes," shares Kara Barbour, Lausanne's Head of Lower School. "The

addition of mindfulness activities gives these young children powerful self-management tools as they develop their language skills and social interaction with others."



The Lower School counselor leads and creates quidance lessons shared with class groups and individual sessions. Community Time activities bring the entire division together in reflections, such as the Thanksgiving Post-It Note activity, which covers the Lower School's walls with a wide variety of thanks by Lower School students each November.

In Lausanne's Upper School, social-emotional learning activities weave the student body together by providing continual opportunities for self-reflection. Along with daily group advisory discussions, students have various other SEL opportunities, including journaling activities, mental performance training sessions for varsity sports teams, and student groups and clubs focused on mindfulness. As part of the I.B. Diploma Programme, students also complete specific Creativity, Activity and Service (C.A.S.) projects that align with Upper School's SEL efforts.

An advisory committee of field experts works with Lausanne's Director of Social-Emotional Learning, Greg Graber, to continuously review and expand the SEL program. These social workers, psychologists, psychiatrists, and pediatricians have also participated in a virtual Social-Emotional Learning Speakers Series that is available online with additional SEL resources at lausannelearning.com/sel.

Graber joined Lausanne's faculty in 2004 and was the Head of Middle School for 12 years. During that time, he oversaw the development of the Mindfulness and Daily Focus activities. With his extensive knowledge on the subject of mindfulness, his work has been featured in

the New York Times and on ESPN, and he has presented at Harvard University Graduate School of Education. He also consults with other schools like Deerfield Academy and Episcopal High School on developing similar mindfulness programs.

"It is our goal for these programs to add value to the lives of every constituent of our Lausanne community," said Graber. "SEL is relatively new in this region, and some have misconceptions about what it is and isn't. We are fortunate to have such a strong and dedicated group of experts on our Social and Emotional Learning Advisory Council to give us feedback on what current trends we need to address within these programs."

The establishment of this program was highly instrumental in the school's initial response to COVID-19 in the spring of 2020. In addition to safety measures taken to protect the community, Lausanne Headmaster Stuart McCathie's top priority was to utilize Lausanne's advisory and SEL programs to ensure students felt emotionally and socially supported.

Understanding that children can develop anxiety when dealing with situations out of their control, Lausanne's Communications department regularly shared CDC updates and advice from the school's COVID-19 Task Force physicians. Families were additionally encouraged to support their children by helping them process their feelings and sharing ways their family and school were prepared to respond to the pandemic.

In response to Lausanne's ongoing socialemotional support and continuation of classes during that time, Lausanne parent Amy Dorsey wrote, "The fact that the school community can keep in touch is amazing. The contact with those you are accustomed to seeing every day has truly been a blessing for us. It brings some sense of normalcy to the lives of these students even though they may not realize it."

The combination of Lausanne's continuous academic platform and firmly established Social-Emotional Learning Program during the time of COVID led to an increase in the school's enrollment, including a multi-tiered waitlist.

"I am thrilled that Lausanne is forward-thinking enough to understand the benefits of a robust, comprehensive K-12 SEL program," shared Graber. "We are teaching our students competencies of SEL: self-awareness, social awareness, relationship building, decision making, and self-management. These skills will enable our students to succeed in school and life in general." +

Cracking the Code: Making Psychographic **Data Work for You**

BY DANA NELSON-ISAACS, FOUNDER AND PRESIDENT OF DNI CONSULTING (CA)

You have been trying and trying to crack the code on your messaging strategy: WHO am I talking to and WHAT do they care about?

And then the A-ha moment comes. Your eyes light up. Could psychographic data be the missing key? But then you aren't even sure where to begin, nevermind how to use it. Find the information you need in these top six FAQs about psychographic data to better understand why it's important and what to do with it.

So, what exactly IS psychographic data and why should I care?

Psychographic data is the "why behind the buy." If demographics describe WHO the buyer is—their income, age, and so on-psychographics fill in that outline to help us understand customer motivations, opinions, lifestyles, and values. If you only pay attention to demographics, you only understand one dimension of the buyer. Psychographics inform your messaging and outreach strategy in a much more nuanced way.

This data is available for purchase and by gathering in more qualitative ways, such as focus groups and surveys, which are great ways to understand your audience. It then can be applied to your specific school situations.

How are data companies getting the information?

Basically, every time we do something financial, our data is bought and sold. This is why, for example, when you buy something at Banana Republic, you receive mail from Anthropologie, or when you purchase a home, you start receiving mail regarding home insurance. This is legal, although it's a little uncomfortable!

How can the information be used?

There are so many ways! Once you understand what your buyer cares about, you can massage your messaging to appeal to the people you want to attract. This is extremely detail-oriented, creative work that allows you to speak to your audiences in the ways that work for them. It might be like direct mail, digital advertising, event planning, topics highlighted on a blog, thought leadership positioning, parent ambassador training, and so on.

You can try to find more people like the ones you already have or look for people the school is not currently attracting. You can also use it internally for retention purposes. Once you understand what the people inside your community care about, you can tailor communication that resonates for them.

This is NOT about changing your school. It's about getting very specific in what is shared and how so that it reaches the audiences you hope to attract. It's an exercise in empathy.

What if competitors do it too?

When you only look at the areas around you and haven't studied your current families, it is possible that your messaging could end up sounding a lot like your competitors since they are looking at the same information you are. However, when you learn what segments your current families fall into and you look for more (or less) of them, you will naturally create tailored messaging, as other schools will have either also done that work with different results since they are a different school, or they won't have done this work and their messaging will be more vague.

What kind of results are achievable using this data?

There seems to be a borderline obsession with getting more families at the top of the funnel—and I get it. You want to fill your school, or you want to be more selective. However, I would argue that you need the RIGHT people.

We've seen schools achieve a 46% increase in applications, 4% increase in enrollment, 100% yield, a 50% decrease in pay-per-click costs on Facebook...these are results born from targeting the market where the school has opportunity and then talking to their potential audience in ways that are appealing to them.

Can I do this work myself?

There is a lot you can do yourself. The major players in this space have free resources where you can put in your zip code and learn about the segments that are present. Then you take that information and create messaging strategies around the people present. This is doable if you have the right people, time, and mental energy to do it yourself-it requires interpreting buying habits into values, then determining how to best talk to those folks.

A harder piece to do alone is understanding who your current families are and determining if you have captured market share. These are paid services and, frankly, these companies are set up to help the Targets and the Walmarts of the world, not our relatively-small-beans schools. Is it doable on your own? Yes. But expert help is advisable unless you have a team with people who can devote resources to the analysis.

Regardless of how deep a dive you do, we highly recommend exploring psychographic data as a tool to help you identify key audience motivations and values. +



DANA NELSON-ISAACS

Dana, Founder and President of DNI Consulting (CA), has twenty years of experience working within and between all levels of administration and faculty, parents, students, board members, and other community stakeholders regarding a range of topics related to enrollment management, including market research, communication, marketing, and constituency satisfaction. Visit www.dniconsulting.biz to learn more.



Yield

Thank You to Our **Authors, Contributors,** and Readers

As we head into our 2022 Annual Conference, we're thrilled to provide you with this fall issue of The Yield, packed with valuable insights and professional development tactics to kick off the new academic year and help you achieve your enrollment goals. We hope you found this issue informative and came away with numerous tips and tools to help you successfully do the work you do.

But, you wouldn't be enjoying this magazine today without the content submissions and story ideas offered by readers just like you. We are privileged to publish truly outstanding, high-quality articles and data that make important contributions to the work you do and we thank each of our authors and contributors for their submissions.



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