



ADVANCING THE MISSION OF
CATHOLIC EDUCATION

*Enrollment Management and Marketing
Workbook and Toolkit*



ARCHDIOCESE OF ST. LOUIS
Catholic Education Center

MAI IMPLEMENTATION COMMITTEE

Priority 5-Enrollment Management and Marketing

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*May the God of endurance and encouragement grant you to live in such
harmony with one another, in accord with Christ Jesus, that together you may
with one voice glorify the God and Father of our Lord Jesus Christ.*

- Romans 15:5-6

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Throughout the workbook are references to the “Toolkit for Enrollment Management and Marketing.” Access downloadable templates and instructions for a variety of enrollment management and marketing activities by logging on to the Toolkit web site at www.archstl.org/EMP

INTRODUCTION

In 2018, Catholic schools in the Archdiocese of St. Louis will celebrate the 200th anniversary of Catholic education in St. Louis. Bishop DuBourg and St. Rose Philippine Duchesne began the work west of the Mississippi with the establishment of the first Catholic College (Saint Louis University) and the first free school (The Academy of the Sacred Heart) in 1820.

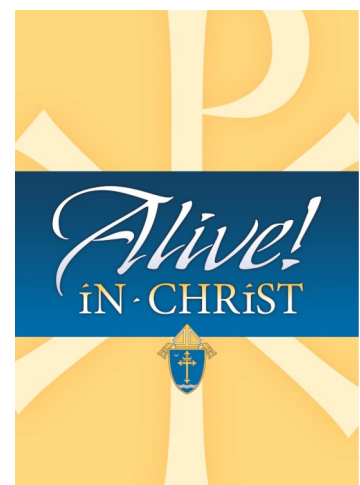
Since then, Catholic educational leaders in St. Louis have pioneered the desegregation of education, established schools for children with special needs, and laid the foundation for what has become the largest system of schools in the State of Missouri and the eighth largest Catholic school system in the nation. Catholic education is one of the primary reasons St. Louis has come to be known as “the Rome of the West.”

During the middle of the 20th century, Catholic education enjoyed a period of growth in St. Louis, and parishes were hard-pressed to build schools fast enough. But, by the turn of the century, a variety of well-known factors led to the decline of enrollment in Catholic schools. Despite efforts to address the issues, schools have continued to close, and enrollments continue to decline.

In 2007, the Catholic Education Office proposed a key question: “As we approach the bicentennial anniversary of Catholic schools in the Archdiocese of St. Louis, enrollment trends, which peaked in the 1960s, are a cause for concern. What must we know, understand and accomplish in order to plan and celebrate, just ten (then) short years from now, a system of schools that is viable, sustainable, and growing?”

The “Art and Science of Enrollment Management” addressed the question with a two-fold response—marketing and enrollment management. The Catholic Education Center provided training at no cost to parish elementary schools in the formation of enrollment management teams and the development of systematic plans to address student recruitment and retention. Approximately 60% of schools developed plans and report varied success based on the degree of implementation.

In 2010, Archbishop Robert J. Carlson shared his vision for Catholic schools, borrowing a theme used by Pope Benedict XVI during his pastoral visit to the United States in 2008: *Alive in Christ!* During Catholic Schools Week that year, Archbishop Carlson made the bold and courageous statement that Catholic schools would be his “first priority.”



Two years later, after extensive listening sessions, surveys and consultation with Archdiocesan leaders in Catholic education, he issued *Alive in Christ 2018—A pastoral letter on handing on the faith to the young Church*.

He wrote, “In short, handing on the faith to the young Church is an essential part of the Church’s evangelizing mission. And Catholic schools—both by virtue of the numbers of children formed and by virtue of the example of formation provided—stand at the heart of the task of forming children in the Catholic faith. The stability and the growth of Catholic schools, therefore, are topics that must concern all Catholics who take the missionary mandate of Christ seriously.”

The missionary mandate is this—“Go, therefore, and make disciples of all nations, baptizing them in the name of the Father, and of the Son, and of the Holy Spirit, teaching them to observe all that I have commanded you: (Mt 28:19-20).”

“Forming children in the Catholic faith is a crucial task if the Church is going to have the ever-fresh energy needed to fulfill that mandate from Christ,” said Archbishop Carlson.

MISSION ADVANCEMENT INITIATIVE

The Mission Advancement Initiative, including four goals—Catechesis and Academic Excellence, Evangelization, Social Justice and Stewardship—and ten priorities, was promulgated in February 2012. Since then, committees have been formed to plan for the implementation of the various components of each priority.

Regarding Evangelization, Archbishop Carlson wrote, “The school must be growing. Proactive recruitment and enrollment management strategies are an essential sign of life for Catholic schools. All Catholic Schools in the Archdiocese should either have a commitment to increase their enrollments or, if a school is filled to capacity, to refer families to nearby Catholic schools and assist them in enrolling there. We cannot be content with the status quo or, worse, with declining enrollments in our schools. To truly be *Alive in Christ*, our schools must be vibrant centers of evangelization and missionary activity. Promoting growth is not optional—no matter how difficult the challenges. Excellence in our educational programs, in our liturgy and spirituality and in our service programs all contribute to a vibrant, growing school community, but we can’t stop there. Every school should have a student recruitment plan, and every member of the school community should have a part to play in growing the school’s enrollment.”

The goal of this workbook, *Advancing the Mission of Catholic Education in the Archdiocese of St. Louis*, is to provide guidance to schools in the development of an enrollment management and marketing plan that addresses the challenges of maintaining and growing school enrollments. The committee assigned the task of developing this resource stands ready to offer assistance on an individual basis, as well.

May God bless you and your school community in the development and implementation of your plan!



Archbishop Robert J. Carlson dedicates one of the first three Archdiocesan elementary schools, St. Louis the King School (formerly Cathedral Basilica Parish School) in September, 2012.

CHAPTER I: *The Current Reality*

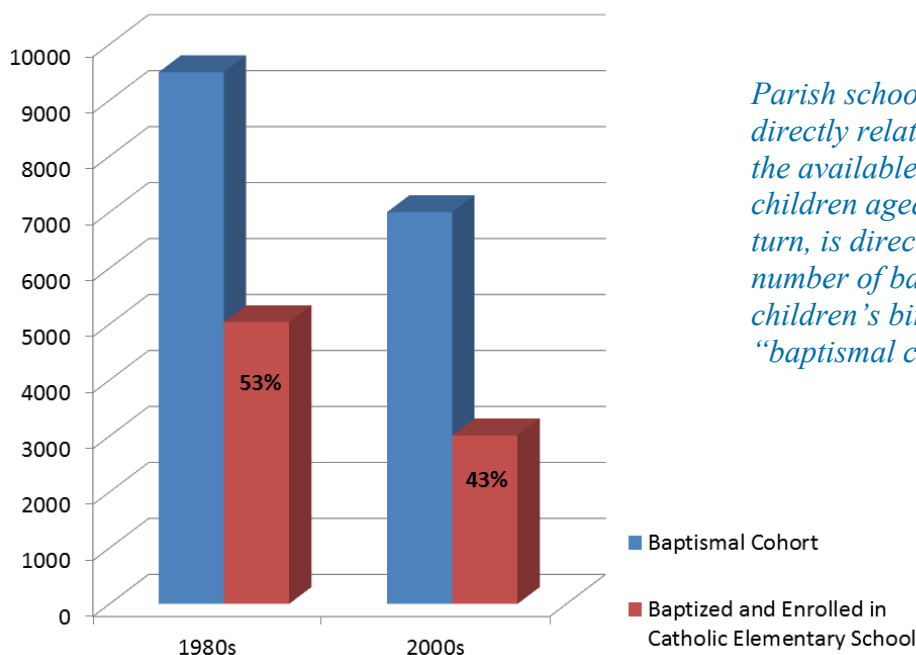
In the Archdiocese of St. Louis there is no shortage of excellent options for parents who seek a Catholic education for their children. In fact, there are over 140 Catholic elementary schools led by mission-minded principals and dedicated, professional educators who serve more than 20% of the school-aged population in the St. Louis metropolitan area and surrounding counties.

However, the current reality is that without an effective enrollment management and marketing plan, Catholic schools cannot maintain and grow their enrollments, and they place themselves in jeopardy of reduction in services and potential closure. There are a number of reasons for declining Catholic school enrollments.

Parish school enrollment is directly related to the size of the available pool of Catholic children aged 5-13, which, in turn, is directly related to the number of baptisms in these children's birth years, or their "baptismal cohort."

In the 1980s, approximately 9,500 children were baptized each year in the Archdiocese of St. Louis. In the 2000s, less than 7,000 children were baptized each year. In the 1980s, 53% of the baptismal cohort was enrolled in a parish elementary school. In the 2000s, this proportion has declined to 43%. A difficult economy and high-quality (perceived or real) public school competition have compelled some families to leave Catholic schools.

Without an effective enrollment management and marketing plan, Catholic schools cannot maintain and grow their enrollments.



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In order to stem and reverse the current tide of declining enrollment, schools must take systematic and proactive measures to attract and retain a student population that is sufficient to support an excellent Catholic school, defined as strong in Catholic identity, academics and catechesis.

To address the economic factors related to declining enrollments, Archbishop Carlson has taken aggressive measures to establish new funding of scholarships so that every Catholic family who desires a Catholic education for their children can afford it.

All schools must make sure that both new and existing families have access to the information necessary to apply for these scholarships as a part of their enrollment management plan. But, funding is not the only issue.

The Today and Tomorrow Educational Foundation (TTEF) established the *Alive in Christ* Scholarship Program for new and existing families in parish elementary schools for the 2012-13 school year. Over \$1,600,000 was distributed in 2012, and another \$2,000,000 in 2013, as parishes commit to a phased-in 2% assessment of their annual income. A capital campaign and foundation are in the planning stages to increase revenues available for tuition assistance.

Catholic schools must be, in Archbishop Carlson's words, *Alive in Christ*, as evidenced by their vibrant Catholic identity. And, Catholic schools must be academically and catechetically excellent, in order to attract selective parents who desire the very best education for their children.

Additional Mission Advancement Initiative priorities address educational and catechetical goals and objectives which are critical to a school's marketing and enrollment management goals and objectives. Think of it this way—in order to attract a customer, (in this case, parents with prospective students) one must have an excellent product, and the prospective customer must KNOW you have it and how to access it, as well as be able to afford it!

When a family makes a decision to send their preschool-aged child to a parish or Archdiocesan Catholic elementary school, and intends for that child to remain in a Catholic school through high school, that family is potentially making a \$100,000 decision! Parents have a right to expect a significant return on that investment in terms of the academics and faith formation (catechesis) programs offered.



Yard signs are a great way to welcome a new student and send a positive message to the community!

Assuming a school has a quality product to market, the following chapters will provide guidance in the development of an enrollment management and marketing plan that will help ensure a stable and growing enrollment for the future.

CHAPTER 2: *Enrollment Management and Marketing*

The terms “enrollment management” and “marketing” are often used interchangeably, and they are closely related. For the purposes of this workbook, the following definitions will apply.

Enrollment management refers to the systematic process of analyzing and defining enrollment goals and establishing procedures to reach and maintain them. An effective enrollment management core team (EMCT) and plan (EMP) are critical components to achieve an optimal student enrollment.

Marketing is the effective communication of the benefits a product (a Catholic education at “St. Elsewhere”) and makes the customer (parents) desire it, thus increasing enrollment. Marketing advances the mission of the school by building and nurturing relationships with current and potential families. Marketing makes the school more visible in the community, and informs potential families of what it has to offer. Effective marketing can stimulate increased support from alumni, the local business and civic communities, and donor support. It communicates that the school community is proud of its product and committed to continued growth and improvement. The message must be clear and consistent—Catholic education in general, and at each Catholic school in particular, is a superior educational choice as evidenced by measurable outcomes.

Marketing makes the school more visible in the community, and informs potential families of what it has to offer.

A “current, creative and proactive enrollment management plan” provides all the

Mission Advancement Initiative Priority 5 - “All elementary schools are expected to have a current, creative, and proactive marketing and enrollment management plan that will address how they will maintain and increase their school’s enrollment.”

necessary information, goals, strategies, action items and means of evaluation and revision to manage the size of the student population. It defines the school’s product and image. It is the standard each school should strive to meet.

The marketing plan will flow from the enrollment management plan by systematically communicating information based upon all the indicators of an excellent Catholic school. The “bottom line” is that a school’s marketing plan should be designed to generate interest and inquiries. From there, the enrollment management plan (EMP) turns as many of those inquiries as possible into enrolled students.

The Enrollment Management Plan (EMP)

An EMP Template consisting of each element to be used in the development of your school's EMP is included in the Toolkit. An Evaluation Rubric is also included in the Toolkit with detailed descriptors of what it "looks like" when each benchmark is implemented to a level that "exceeds," "fully meets," "partially meets," or "does not meet" the criteria.

The EMP should include the following key components:

- **Enrollment Management Core Team (EMCT)** (*Benchmark 1 - The school has an active enrollment management core team that assists the administration with enrollment management/marketing functions. All members of the EMCT have assigned roles and responsibilities.*) Chapter 3 contains detailed information about how to form an EMCT and the roles and responsibilities of each team member.
- **School Mission Statement** (*Benchmark 2 - The school's mission statement is a living document that guides decision-making processes in every aspect of the school.*) Chapter 4 addresses the development of a school mission statement in more detail.
- **Recruitment and Retention Goals, Strategies, Action Items, Persons Responsible, Timeline and Evaluation Process** (*Benchmark 3 - The Enrollment Management Plan contains recruitment and retention goals, strategies, action items including persons identified as responsible for their execution, a timeline for each item, and an evaluation process.*) Chapter 6 addresses recruitment and retention.
- **Admissions Process** (*Benchmark 4 - The Admissions Process is designed to maintain contact from the first recruitment indicator (phone/web inquiry, tour, etc.), through interview, testing/screening, application, acceptance and enrollment.*) Chapter 6 addresses the admissions process.
- **Marketing Plan** (*Benchmark 5 - The Marketing Plan reflects the recruitment and retention goals for each school year and includes strategies and actions identified to achieve them, including communications, public relations, special events and advertising initiatives.*) Chapter 7 focuses on developing an annual marketing plan.

The school's mission statement is a living document that guides decision-making processes in every aspect of the school.

CHAPTER 3: *Forming an Enrollment Management Core Team*

In order to form an effective **Enrollment Management Core Team (EMCT)**, thoughtful consideration should be given to the selection of the “right people for the job.” Leadership from the principal and pastor is essential, of course, but to be most effective, an EMCT needs additional people with specific skills and talents to participate in the development of an EMP and take responsibility for its implementation, evaluation and regular revision.

Rather than putting an ad in the bulletin or newsletter calling out for help from anyone who might be listening, it is important that the principal be strategic about whom to invite to serve on the school’s EMCT.

Finding the right people may seem daunting, but having a clear picture of the roles and responsibilities that need to be filled will make it easier to decide who might be the best choices to fill each role. In addition to the pastor and principal, the EMCT could include teachers, current and former school parents, parishioners and alumni who have particular skills and are enthusiastic supporters of the school and/or parish.

It is not essential that each of these roles be assumed by separate individuals, especially in the case of a small school. For example, one person might fulfill the role of treasurer and finance expert. Some examples of roles to be filled by members of the EMCT include:

- **Leader/Chair-** It is best if this can be a staff member or trusted volunteer, but someone other than the principal or pastor, who helps set the agenda, keeps the meetings moving and maintains a schedule of accountability.
- **Technical Advisor-** The best candidate will help with the technical issues related to establishing and maintaining the database of current school families and prospects. Who will manage the data that is essential to tracking the success of enrollment management activities? Who will be responsible for the maintenance of the school website?

*“There are different kinds of spiritual gifts but the same Spirit; there are different forms of service but the same Lord: there are different workings but the same God who produces all of them in everyone.”
-1 Corinthians, 12:4*

Regular EMCT meetings and shared responsibilities ensure a successful enrollment management plan.



- **Treasurer-** This will likely be someone with a head for figures who can help create a reasonable marketing budget (and no matter how small, there should be one) and manage any financial transactions that may be required of the EMCT's work.
- **Evangelizer-** This role needs to be filled by someone in your school community who is great at drawing people in—someone who can help you spread the good news! This might be the person also designated to provide school news to *The e-Vangelizer*, the weekly electronic newsletter published by the Director of Marketing and Community Relations at the Catholic Education Center. (See **Toolkit for Guidelines for Submission of Articles and Photos to The e-Vangelizer and Archdiocesan web site.**)
- **Public Relations Expert-** A parent or parishioner who is a professional in the area of public relations, marketing and/or communications, or an alumnus/college student who is studying PR or marketing could be viable candidates.
- **Finance Expert-** This person will keep the EMCT informed about school finances and other financial considerations that may be relevant to the work of the team (i.e. tuition assistance, development, etc.) This could be the person to track scholarship opportunities offered by the **Today and Tomorrow Educational Foundation** (www.archstl.org/TTEF).
- **“Star Teacher(s)”-** Teachers that personify the mission and culture of the school are excellent choices. Is there a leader among the staff who can help all teachers understand the important role each plays in enrollment management? Perhaps this/these teacher(s) could offer professional development in the role of the teacher in the EMP. (Contact the Director of Marketing and Community Relations for assistance with staff development.)
- **Organizer-** This may be the school's Administrative Assistant or other staff member assigned to assist with all the details of the EMP and help the Leader/Chair keep activities moving along (i.e., scheduling meetings, distributing agendas and minutes, etc.). The Organizer may also be the person trained in the use of the tracking tool and provide information to persons responsible for various action items related to recruitment and retention.



BRIGHT IDEA!

Be strategic about inviting members to serve on the EMCT. To be most effective, an EMCT needs people with specific skills and talents to participate.

Duties of Enrollment Management Core Team

Once an EMCT has been assembled, an initial meeting, possibly even an extended Saturday morning “retreat,” will serve to formalize the team, help team members get to know one another and their roles, and bond as a group commissioned to accomplish a very important task. Gather in prayer, or begin with Mass, if possible. Serve breakfast and get to work on building the foundation for your school’s EMP. The main purpose of the initial meeting is to gain an understanding of enrollment management and to delegate areas of responsibility to team members so there is a point person for each aspect, for example:

The main purpose of the initial meeting is to gain an understanding of enrollment management and to delegate areas of responsibility.

- **Identification/Review/Revision of the School Mission Statement** (See Chapter 4.)
- **Research and Data Analysis** Identify the school’s strengths, weaknesses, opportunities and threats or “SWOT;” demographics; enrollment history; attrition rates/reasons, etc. The first meeting or “retreat” could be spent reviewing this enrollment data and beginning to develop a SWOT. (See Chapter 5.)
- **Realistic and Measurable Recruitment and Retention Goals, Strategies and Actions Items** This is the “meat and potatoes” of your plan and will likely take several meetings to work through. (See Chapter 6.)
- **EMCT Communications Plan** Decide how the EMCT will best communicate with one another, and also how they will keep the parish and school community informed of their work and progress. The Organizer might be assigned the task of scheduling monthly meetings and sending reminders to team members via email or phone. It will be important to emphasize the need for confidentiality when it comes to financial issues.
- **Assignment of Individual Responsibilities** Decide who will oversee the execution and regular evaluation of each strategy and action item.
- **Succession Plan** Develop a means of replacing EMCT members when they are no longer able to serve. This may vary from school to school based on size. One member of the EMCT should either sit on or report to the school board.

CHAPTER 4: *The School Mission Statement*

A mission statement that is truly “Alive!” should be on the tip of everyone’s tongue so that there is never a doubt as to why the school exists, whom it serves, and how it serves its students and the community.

What IS a mission statement, and how does it differ from a school “philosophy” or “vision statement?” Philosophy and vision statements provide a broad framework to guide the direction of a school. Flowing from those, a mission statement is a clear and concise expression of the reason the school exists. In basic language that everyone can understand, the mission statement describes succinctly what the school does and for whom.

An example of an enduring mission statement is the one developed by Monsignor Elmer Behrmann, founder of the Archdiocesan Department of Special Education in 1950. It is clear and concise and remains relevant into the 21st century--

The mission of the Department of Special Education (DSE) is to provide quality education, success in life, and a living faith for children with special learning needs.

This sentence identifies the agency and in three simple phrases describes what is provided and to whom. This mission statement is easy to memorize, and all administrators of the DSE know it and refer to it in communications, such as thank you letters for donations. It is prominently displayed in every DSE school and center, and is illustrated in the department’s brochure. The DSE and St. Mary’s Pre-Schools brochures are available on the archdiocesan website.



*Students of The Academy at St. Sabina
(Archdiocesan Department of Special Education)
celebrate Dr. Seuss’s birthday.*

Simple steps to develop, evaluate and revise a school mission statement

- Form an ad hoc committee with representation from each group impacted by the school's mission—the administration, faculty, staff, parents, parishioners, students, etc.
- If a mission statement already exists, determine if it captures the essence of the school's purpose, whom it serves, and how.
- Give consideration as to how the school mission statement differentiates the school from other schools. Perhaps it reflects the charism of its patron, or founder. Identify two or three unique characteristics that set the school apart from others. These unique characteristics often surface during a SWOT analysis. (See Chapter 5.)
- Consider studying mission statements of other schools and organizations for ideas.
- To evaluate an existing mission statement, refer to the Evaluation Rubric in the Toolkit.

Importance of communicating the school mission statement—

Once the school mission statement is developed or evaluated and refreshed, it is vital that it be shared with and embraced by everyone in the community. As members of the school community, all share in the execution of the mission of the school!

School and parish leaders, teachers, parents—even students—should all be able to articulate the mission of the school and apply it to their participation in the school community.

Refer to the mission statement in decision-making and development of policies and procedures. Incorporate the words of the mission statement into presentations, speeches, meetings, tours, phone calls, etc. When the entire school community is aware of and engaged in the mission, it becomes a truly “living” mission statement and a key indication that a school is *Alive in Christ!*



BRIGHT IDEA!
Have teachers present the school mission statement to their students, and ask them to put it into their own words or pictures.

CHAPTER 5: *The School's Current Reality*

Once the Enrollment Management Core Team (EMCT) is established, all members have their assigned roles, and the mission of the school is clear to all, an in-depth study of the current situation of your school (emphasis on **CURRENT**) is in order. Even if a school has a marketing/enrollment management plan in place, it is critical that it be kept current through annual review, evaluation and revision. A good place to start is an in-depth analysis of the current “situation.”

Even if a school does not currently have an “official” written enrollment management document, there is no question there are strategies currently being used to attract and retain students. An EMP will organize them systematically and institutionalize them, so that they are consistently implemented, or revised and replaced with more effective strategies. A formal plan will ensure that nothing slips through the cracks, and that the committee is working efficiently and wisely.

SWOT Analysis

One helpful strategy to assess the current situation is to conduct a situation analysis, or **SWOT**, which stands for a school’s real and perceived **Strengths, Weaknesses, Opportunities** and **Threats**. Strengths and weaknesses are internal, in that we have some control over them.

Opportunities and threats are external, can be identified, and either taken advantage of (opportunities) or addressed strategically (threats). Pay attention to perceptions. There is a reason for them, and they must be addressed.

Strengths and weaknesses are internal, in that we have some control over them.

The Toolkit for Enrollment Management and Marketing is a companion to this workbook and contains many useful ideas, resources and templates for a school’s EMCT. Access the Toolkit contents online at www.archstl.org/EMP to download templates, including a SWOT Analysis worksheet.

In order to conduct a thorough situation analysis, the EMCT should devote some time and energy to the following:

Situation Analysis (SWOT)— Strengths, Weaknesses, Opportunities, Threats

A SWOT includes:

- A study of the school's enrollment data and demographics going back at least five years. This will provide some insights into how the school's enrollment is trending. The Archdiocesan **Office of Pastoral Planning** may be a valuable source of information if the parish does not have sufficient data. **The Director of Pastoral Planning** is an excellent resource.
- A comprehensive list comprised of all real and perceived strengths and weaknesses (internal), and opportunities and threats (external). It is important to give **an honest assessment of each one**.

Consider the following examples—

Strengths—Teacher credentials; Outstanding programs; New facilities; Unique characteristics, etc.

Weaknesses— Student attrition at certain grade levels; Frequent/Excessive tuition increases; Weak teachers/High faculty turnover, etc.

Opportunities—New homes under construction within parish; Closure of nearby school, etc.

Threats—New charter school opening; Public school expanding kindergarten/preschool programs; Loss of jobs by major employer of parish families; etc.

See Toolkit for a SWOT Template Worksheet.



BRIGHT IDEA!

**Remember that
your competition is
any school to which
prospective parents
compare you.**

Market Research

Market research focuses on acquiring information to better understand the school's target markets and competition. Information gained through market research builds upon the SWOT analysis, as well as any other demographic, financial and statistical data. There are a number of methods of conducting market research:

- Surveys
- Focus groups
- Exit interviews
- School/Parish/Diocesan records

The purpose of this research is to gain the best possible understanding of the school's current clientele—both internal (parents, students, alumni, parishioners, etc.) and those outside the immediate school/parish community (neighbors, business owners, non-Catholic church congregations, etc.).

Some questions to consider in designing a survey/focus group discussion/etc. might include: (Be careful to tailor the questions to the group being surveyed.)

- What is the percentage of Catholic children in the school?
- What percentage of students come from within the parish?
- What are the parish trends in births and Baptisms?
- What is the kindergarten “capture” rate (% of children baptized that enroll in kindergarten five years later)?
- What percentage of students come from other parishes? Which ones?
- What zip codes are represented by current school families? (Include ratio for each.)
- What are the demographic characteristics of each zip code?
- What is the enrollment by grade for the past five years?



BRIGHT IDEA!

Online survey tools such as *SurveyMonkey.com* can be an affordable, efficient and effective way to conduct a market

- What is the retention rate from grade to grade?
- Where do school-aged children in the parish attend, if not at the parish school (competition)?
- What is the enrollment projection for the next 3-5 years?
- What is the enrollment capacity of the school (physical capacity and optimal enrollment with current staffing)?
- Does the school typically lose students at certain grade levels?
- Where do parish children attend preschool?
- Are there Catholic (and non-Catholic) parishes or churches with no elementary school in the geographic area?
- Are there social/athletic programs at the school/parish that include non-school families?
- Why do parents choose a school?
- Why do parents choose to leave a school?
- What is the reputation of the school in the community?
- What are the main perceptions of parents, students, parishioners, faculty/staff, and other stakeholder groups about the school?
- What is the discrepancy between perception and reality?



St. Charles Borromeo School observes Ash Wednesday by burning palms from the previous year giving witness to their Catholic identity.

CHAPTER 6: *Recruitment, Admissions and Retention*

The enrollment management process that ensures a strong student population involves three main components—recruitment, admissions and retention. This chapter is divided into three parts, each focusing on one of these important components.

Part I—RECRUITMENT

Recruitment includes both general and target marketing strategies. During this stage, potential students and their families become aware of a school, its mission, its reputation, and its educational, spiritual, athletic and social program offerings. Above all, the Catholic school must communicate a strong Catholic identity—the key differentiating factor in a comparison between a Catholic school and the local public or private school, which may or may not be equally good or better academically.

- *An excellent resource for indicators of a school’s Catholic Identity can be found in the annual MAI Catholic Identity Assessment.*
- *An excellent resource for indicators of a school’s academic excellence can be found in the MAI Academic Standards and Benchmarks.*

The **GOOD NEWS** is that recruitment is everyone’s job! Make sure **EVERYONE** is doing that part of their job well. When everyone is communicating a consistent and positive message about the school, prospective parents of students cannot help but “get the message!” Never allow anyone to say, “Marketing is not my job!” It’s everyone’s job—the pastor, the principal, the teachers, the staff, the students, the parents, the volunteers, and even the parishioners. Specifically...

The **Pastor** of a parish with an elementary school can play a powerful role in recruiting new students for “his” school. His role begins at the moment he baptizes an infant into the Church. Right then and there, one of the “parting gifts” (along with the certificate, candle and Baptismal cloth) should be a gift from the school that makes the first welcoming contact and expresses a desire to welcome the child into the school community as a “Future [school mascot]” or to the “Class of 20XX.” Inexpensive items to develop as Baptismal gifts might include bibs, cups, a puzzle, etc. And don’t forget new families enrolled in the parish with school-aged children.

Learn more about the Good News brand adopted in 2007 by Catholic schools in the Archdiocese of St. Louis. A related article from NCEA’s MOMENTUM magazine is in the Toolkit.



There are a host of effective marketing strategies the pastor can be responsible for without adding too much extra work to his already-full plate. With some administrative assistance from his office manager and the willingness to incorporate some new behaviors into his pastoral duties, he can have a powerful impact on recruiting new students for the Catholic school of his parish. These might include:

- Articulating regularly and consistently that the parish school is an asset to the parish (not a drain) and helps to fulfill the teaching ministry of the Church
- Making regular visits to the school to demonstrate an interest in the teachers and students
- Dedicating a regular space in the parish bulletin to school news, especially when there is good news to share
- Attending school functions joyfully and developing relationships with school families
- Making the needs of the school an important part of the parish budget
- Ensuring that the entire parish is knowledgeable about the school, values its vitality, and accepts responsibility for its well-being
- Supporting the **Mission Advancement Initiative** and the *Alive in Christ* scholarship program
- Adopting/adapting Archbishop Carlson's statement, **"Catholic schools are my first priority."**

**"Catholic schools are
my first priority."**

**-Archbishop
Robert J. Carlson**

MAI Priority 4b provides "outreach programs for parents after a child is baptized to welcome them into the parish community, offers resources for the education and faith formation of their preschool children, and reserves a place for them in the parish school." For more information, contact the Director of Religious Education Formation.

The **Principal** is the instructional leader of every school, and in a Catholic school, he/she serves as the spiritual leader, as well. The principal must also be the “head marketer” of the school, though he or she cannot do that alone. The Principal is responsible for the establishment of an EMCT and general oversight of the enrollment management and marketing plans, as well as all school communications. As “head cheerleader” of the school, the Principal can be an effective recruiter in countless ways, including:

- Ensuring that every person who reports to the Principal understands his/her role in marketing the school (Teachers might be required to include a recruitment goal in the annual teacher evaluation process.)
- Nominating teachers for awards (**Cardinal Burke Teacher Recognition Award** and **Emerson Excellence in Teaching Award**, for example) and applying for grants and awards for the school (**U.S. Department of Education Blue Ribbon Schools** and **Emerson Gold Star Grant Program**, for example)
- Communicating to all audiences when teachers, students, alumna, pastor, etc. earn awards or win grants
- Being a visible and positive presence within the school and parish communities, as well as in the local community (Attend parish and community events with the intention to market the school by providing positive information and stories about it.)
- Developing positive relationships with every parent, key parishioners, the parish staff, civic leaders, local business owners, local preschools, daycare centers, and churches (both Catholic and non-Catholic without a school, etc.)
- Providing frequent and consistent messaging about the school—its mission, its excellent faculty, instructional programs, student success, etc. (Provide weekly news to be included in the parish bulletin. Publish a regular school newsletter and post it to the school web site. Speak at key events, even if briefly, about the school—its mission, faculty, students, programs, future plans, etc.)
- Being accessible to provide personal tours to prospective parents, as well as at least one special open house, usually held during Catholic Schools Week (**See Toolkit for information on conducting effective tours and open houses.**)
- Recognizing the success of the marketing efforts of the faculty—privately and publicly!

- Establishing a Student Ambassador program, identifying and “deputizing” key students to act as special representatives of the school by giving tours, serving at school and parish events, and training fellow students in their role in marketing by providing a positive image of a “St. Elsewhere” student (**Student Ambassador Training for middle school students is scheduled each fall. Contact the Director of Marketing and Community Relations for more information/registration.**)

The faculty plays a critical role in enrollment management, both in the area of recruitment and retention. Teachers can be effective recruiters by giving witness to their professionalism (both academic and behavioral) and by creating a safe and nurturing environment for every student. It is not necessary for teachers to do “extra” things to help in recruiting new students. All that is necessary is for them to be known for their excellent teaching and for their deep faith and care for each child. The rest will take care of itself. Word-of-mouth marketing is some of the most effective in the recruitment of new families to a school. Everybody knows the teacher whom every parent wants to teach his or her son or daughter. Every teacher should strive to be THAT teacher.



BRIGHT IDEA!
Make one award presentation at each faculty meeting to a faculty member who has implemented a good marketing strategy.

Support staff, such as the administrative assistant, parish bookkeeper or secretary, maintenance personnel and cafeteria workers should all be included in the school’s enrollment management process. Simply communicating to them that their role is important, and outlining how they can be effective marketers for their school can make the difference between a person who feels on the outside (“That’s not my job!”) and one who feels part of the team! We all know that many school maintenance workers are some of the most popular people in the school community. Deputize the administrative assistant as the “Director of First Impressions” and the maintenance man or woman as the “Director of School Environment.” Watch how that awareness of their power to impact the climate of the school turns them into effective recruiters, too, when meeting a potential new family.

Students of Holy Cross Academy gather at one campus to celebrate the new school year with a joint retreat.



Parishioners who value the parish school are critical to its vitality. To a large extent, it is due to their financial and spiritual support that the school exists. Develop relationships with them by communicating with them regularly and involving them in the life of the school. Express gratitude to them whenever possible—publicly and privately. Invite them to special events and honor them during Catholic Schools Week. Let them know their investment is paying dividends! Parishioners can speak knowledgeably about their school only if they have been provided that knowledge. They, in turn, can be effective marketers to new parish families.

Part II—ADMISSIONS

During the Admissions process, mutual interest between school and family continues to grow and move toward the ultimate goal of enrollment.

At the appropriate time in the relationship that has developed through regular recruitment strategies (and recorded and tracked with a tracking tool) the admissions process begins.

This is the time to get to know each other in a more formal and personal way.

- Does the school have the academic and faith formation programs that meet the family's expectations and student's needs?
- Does the family have the willingness to commit to the financial and spiritual responsibilities associated with being a partner in their child's educational and faith formation?

As both parties become confident that this is a “good fit,” the process moves into invitations to tour, shadow, test and interview, which leads to application and admission procedures, notification of acceptance, and formal enrollment. **(See Toolkit for Sample Forms and Letters.)**

Application is the step in the Admissions process where the prospective student/family has expressed a formal interest to be a part of the school community. The application should be seen as both an opportunity to enroll a student, and to capture valuable information about the prospective student and his/her family that will serve in other ways to advance the mission of the school.

Application forms should include basic information about the new student (name, date of birth, current grade in schools, schools attended previously, if any, etc.); contact information for the student's mother and father (name, address, home/business/cell phone numbers and email addresses); information on siblings that presently attend your

school and others (including names and ages); application fee and request for a copy of child's birth and/or Baptismal certificate.

A prompt response to an application packet is essential. Samples letters can be found in the Toolkit. Always refer to the mission and core values of the school in every piece of correspondence!

Acceptance is the school's formal invitation to become a part of the school community. However, enrollment is not considered "complete" until all terms of the letter of acceptance have been met (receipt of transcripts, immunization records, birth/Baptismal certificates, screening/testing, etc.). It is very important that this be made clear in the letter of acceptance, lest families assume the process is complete. Sample letters of Acceptance can be found in the Toolkit, including a separate letter from the principal to the student—build those relationships!

Enrollment/Re-Enrollment is considered "final" when the "accepted" student's family makes a commitment to meet all financial obligations and to support the mission of the school. It is in this component of enrollment management that the transition from applicant to an integrated member of the school community takes place.

Re-Enrollment cannot be assumed. The process must be repeated as the student advances from one grade level to the next. A Sample letter requesting re-enrollment, or explaining your "new" policy for re-enrollment can be found in the Toolkit.

A suggested timeline for the Admissions Process—

January:

First week: Tuition is set by parish Board of Education and Finance Committee.

Second week: Preschool/Kindergarten Information Night is held for prospective families.

Third week: Re-enrollment begins for current families.

Fourth week: Catholic Schools Week; enrollment open to new families

(Open enrollment for transfer/new students may take place at any time during the year.)



BRIGHT IDEA!

Build a positive relationship with new students from the start by sending a personal letter of acceptance from the principal addressed to the student.

Part III—RETENTION

Retention is a never-ending process! It should be easier to keep a student, once enrolled, than to attract a new one. Retention is the result of customer satisfaction, which is based upon how well a school's academic, catechetical, social and athletic programs are meeting the needs and expectations of its students and their parents. The school will be held accountable! If families are leaving, the school must find out why, and if possible, address that "weakness" with a new retention strategy.

It should be easier to keep a student, once enrolled, than to attract a new one.

Retention Strategies

A school's marketing plan (see chapter 7) invites parents to become aware of the school and consider enrollment as an option for their child's education. The admissions and enrollment processes help move parents along from being aware of the school, to being actively interested in enrolling their child, to becoming part of the school community. But enrollment management does NOT end there. Retaining those enrolled students is vitally important to the success of enrollment management efforts. Keeping current students enrolled helps a school maintain and grow enrollment.

An active retention strategy is a sometimes overlooked component of the overall enrollment management process. By establishing some retention goals and strategies, the EMCT can help parents become active and engaged members of the school community, making them less likely to withdraw their children before graduation.



BRIGHT IDEA!

Don't neglect efforts to retain current students—set goals and strategies to make sure parents are active and engaged in the school community.



Christ, Light of the Nations School creates a visual to incorporate the Alive in Christ theme into the theme for their school year.

Understanding Why Students Leave

There are four reasons that most often cause families to leave a school: financial, behavioral, social, and relocation. The only way to know the actual factors that lead to a family's departure is to ask. Principals should conduct exit interviews with any family who leaves, and/or ask them to complete a written exit survey. **See Toolkit for sample surveys.**

Four reasons that most often cause families to leave: financial, behavioral, social and relocation.

While some of the reasons families provide will be outside of the control of a school's administration, some will present opportunities for school improvement. Exit interview information should be tracked regularly, and can be used to identify trends or problem areas that need to be addressed in order to avoid losing additional families.

Setting a Retention Goal

By analyzing the attrition rate from year to year, the EMCT can determine if there are retention issues. One school may simply need to maintain their low attrition numbers by continuing current retention activities, while another could have much opportunity for improvement when it comes to attrition. In either case, by focusing on retention with specific strategies, either by establishing new ones or maintaining those that exist, the school will benefit from a solid foundation on which to grow enrollment.

Knowing Who is Responsible

The school's principal, along with faculty and staff are the main "customer service representatives" who are responsible for retaining enrolled families. Teachers, in particular, have the most "front-line" role in retaining students. They deliver the curriculum and values-based education promised by the school. Equally important, is their attention to building and maintaining professional relationships with parents. This is not always easy, as parents can be challenging and demanding. But when a teacher understands and embraces his/her important role in retaining students and families as members of the school community, the results are impactful.



BRIGHT IDEA!

The only way to know the actual factors that lead to a family's departure is to ask!

Given their critical role in retention of students, teachers should be provided with professional development that will equip them to manage this sometimes challenging part of their job. **Contact the Director of Marketing and Community Relations for assistance.**

Replacement is not a retention strategy. Attrition is measured by the number of students lost each year of the original class composition at kindergarten, also known as a “cohort.” Information gained about reasons for withdrawals should be addressed by specific strategies, when possible. It is inevitable that some students will leave due to a family relocation, but if students are leaving a school because of a weak math program, that can and must be addressed.

Developing strategies and activities to achieve retention goals is an important part of the EMP. Specific actions that can help strengthen parents’ connection to the school community include:

- **Being a visionary communicator.** The entire school community should be informed and engaged in the school’s purpose and vision for the future. Communicate a consistent and regular message about the mission of the school and plans/goals for the future.
- **Providing *Good News* to parents regularly.** Individual phone calls or written notes home sharing **positive** feedback about their child(ren) can send a powerful message about the value of each student. Parents are accustomed to hearing from the school if there’s a problem, but will be delighted that someone took the time to share a positive occurrence, no matter how small.



BRIGHT IDEA!
Principals, state an expectation that all teachers share some Good News with the parents of one of their students each and every day. This is one example of a potential professional development goal.

- **Sparking excitement for the future.** In the spring, organize a “Step Up” day, where each grade level spends the day in the next year’s grade (i.e., first graders spend the day with the second grade teacher). A day such as this can provide enthusiasm and excitement for students as they look forward to their next school year. Ideally, they will go home and talk to their parents about the experience! Special programs and activities that are assigned to each grade inspire anticipation of the next school year. For example, if the sixth grade outdoor education program has become a traditionally positive experience, fifth graders will be looking forward to “next year,” and so will their parents. If the seventh grade Confirmation preparation activities are well-known to be powerfully spiritual, students will want to be a part of that experience, and their parents will value providing it for them.



BRIGHT IDEA!
Regularly remind students and their parents about the specific experiences and projects they have to look forward to in future grade levels.

- **Asking for feedback.** By conducting an annual parent satisfaction survey and taking informal polls about certain events throughout the school year, schools send a message that parent input is welcome and valued. (See **Toolkit for sample parent surveys.**) It is also important to report on the findings of the survey and plans for improvement.
- **Keeping in touch when school is out.** Principals and teachers often look forward to some well-deserved downtime during the summer months. However, it is important to find some way to keep families in touch with the school, even while not in session. A simple email newsletter can provide a reminder that the principal and teachers are planning for the next year, even as they enjoy their summer vacations and pursue professional development opportunities. And parents need to know about those, too! Principals should include this type of information at back-to-school nights when introducing the staff to parents. Knowing their child’s teacher spent part of his/her summer learning new skills inspires pride and confidence in him/her and the school. Creating a simple event such as a Family Movie Night or an Ice Cream Social during July can be a good reason for families to stay in touch with the school and one another, thus reinforcing the sense of community that is essential for strong retention.

- **Making financial discussions personal and relationship-building.** When communicating with parents about tuition, schools should make an effort to have a representative (principal, pastor, business office director) sit down for a personal meeting with each family to review their tuition statement, including all financial aid and scholarship credits, as well as a reference to the investment (i.e., subsidy) the parish is providing. Sometimes, parents need to be reminded of that. No tuition in a parish elementary school represents the true “cost to educate” a child. While a commitment in terms of time, these conversations can help families understand where their money is going, and that they are actually benefiting from the generosity of the parish.



Students of Blessed Teresa of Calcutta school cut the ribbon in celebration of the opening of their expanded facility in 2012.

- **Pairing families with mentors or prayer partners.** When a new family enrolls, providing another family that has been around a while to “hold their hand” and help get them get accustomed to regular events and traditions unique to the school can make them feel much more welcome and a part of the school community. It is truly an act of evangelization! (Nothing is worse than sending your child to school in uniform on school picture day when all the other students are dressed in their Sunday best because you didn’t know!)
- **Celebrating Catholic Schools Week.** This special week at the end of January can be a way to market the school to potential new families as part of the schools’ marketing effort. Do not overlook the opportunity to help current families feel good about their school, too, by celebrating with them during this special week. Invite both current and prospective parents to a Catholic Schools Week liturgy, assembly or luncheon.
- **Address attrition indicators.** Identify why people tend to leave the school and develop strategies to address any weaknesses, whenever possible.

Summary

These are just a few of the many possible ways that a school can engage and keep parents and families in their community. By recognizing the importance of retention, and giving it the time and attention it deserves, Catholic schools have the opportunity to solidify and grow their enrollment. When parents feel engaged and committed to the school community, they not only keep their children enrolled, but often become a school’s best marketers, inviting new families to join them.

CHAPTER 7: *Developing an Annual Marketing Plan*

Marketing (as defined in Chapter 2) is the effective communication of the benefits a product (a Catholic education at “St. Elsewhere”) and makes the customer (parents) desire it, thus increasing enrollment. Consider these marketing strategies, for example:

Marketing advances the mission of the school by building and nurturing relationships with current and potential families.

Example: Develop a schedule of regular contacts with families of newly-baptized parishioners. Second grade students might send a handmade card in remembrance of the future student’s baptismal date. Third graders might write to the child the next year describing some exciting third grade program/activity. Keep the family of the prospective student in the “pipeline” with simple and personal communications from various members of the school community at regular intervals. It will make the transition to preschool and/or kindergarten seem inevitable!

Marketing makes the school more visible in the community, and informs potential families of what it has to offer.

Example: Yard signs that welcome incoming kindergartners and new students send a message, not only to the student and family, but to the entire neighborhood!

Effective marketing can stimulate increased support from alumni, the local business and civic communities, and donor support.

Example: Publicity about significant student/faculty achievements creates pride in former students and a commitment to support “their alma mater!”

Marketing communicates that the school community is proud of its product and committed to continued growth and improvement.

Example: Ads, billboards, articles in local newspapers, etc. create a sense of the contribution a school makes to the local community. Without a well-communicated “brand,” a school may be the “best kept secret in the area.” That is not a desirable goal!

The message must be clear and consistent—Catholic education in general, and at each Catholic school in particular, is a superior educational choice as evidenced by measurable outcomes.

Example: Regular, consistent messaging via website, social media, print advertising (starting with the parish bulletin!) will create an impression that “St. Elsewhere” is a high-quality academic institution whose graduates are successful members of both the Church and society, and it can be proven with concrete evidence. such as “99% of graduates of “St. Elsewhere’ are accepted at their ‘first-choice’ secondary school!”

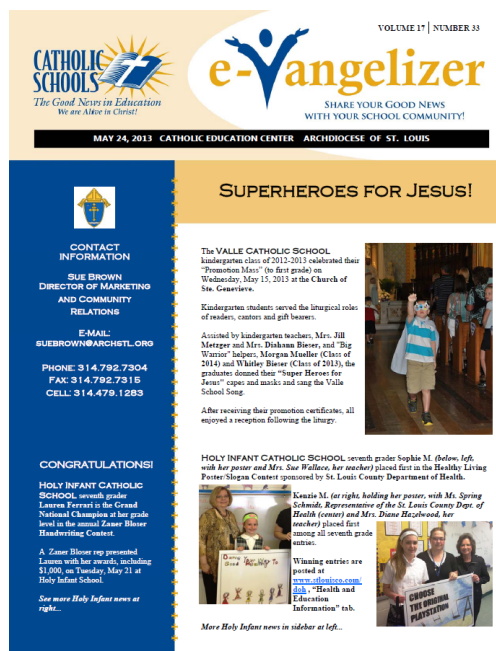
The Annual Marketing Plan

An effective annual marketing plan will reflect the recruitment and retention goals for each school year and the strategies and actions identified to achieve them. It will provide various means of achieving enrollment goals and strategies including communications, public relations, special events and advertising. **See toolkit for a school marketing plan template.**

The marketing plan that exceeds Benchmark 5 (“The Marketing Plan reflects the recruitment and retention goals for each school year and the strategies and actions identified to achieve them.”) integrates all of the following components as described in the evaluation rubric (**See toolkit.**):

Communications—“The marketing plan provides for all of the following: a functional and interactive school web site, social media, bulletin announcements, newsletters, submissions to *The e-Vangelizer*, etc., trained speakers for parish/school/community events, and trained student ambassadors to attract prospective students and provide a means of communication with current school families and the community. The EMCT has developed additional creative communications that have proved to be successful.”

The e-Vangelizer is a weekly electronic publication of the Catholic Education Center that shares the Good News of Catholic schools in the Archdiocese of St. Louis. All schools are invited and encouraged to submit their Good News and share The e-Vangelizer with their school, parish and local community.



Public relations—“The marketing plan provides for press releases about and/or invitations to special school events and about community service, parish/school activities and student/teacher success stories, etc., to both internal and external audiences. The school has experienced significant response from media and target audiences to these communications.”

Special events—“The marketing plan is designed to initiate and develop a relationship with families of prospective students. It includes all of the following: at least one open house event annually, and a regular schedule for school tours, invitations to special meetings, liturgies, student performances, Catholic Schools Week events, etc.”



Never miss an opportunity to say thank you and share your Good News with the local community!

Advertising—“The marketing plan includes all of the following means of communication about the attributes and special events: ads placed in local news outlets, on community bulletin boards, in local businesses, etc.; a current (revised within the last three years), professionally-produced brochure; yard signs, flyers and/or direct mailers (within parish boundaries); branded spirit wear/items, etc.”

Important! *When members of the school community “wear or bear” clothing or items that associate themselves with the school, they should be aware that they are “advertising” or “marketing” the school. For example, when students are out in the community in their school uniforms or spirit wear, their behavior will reflect on their school. Make them aware of that to encourage their best behavior, and therefore, best messaging!*

And, speaking of training students...Student Ambassador training (offered each fall by the Catholic Education Center) emphasizes the middle and high school student’s critical role in marketing. People will decide what they think about your school by how the students act and speak in public. It may not always be “fair,” but it is the reality. To learn more about registering students for Student Ambassador training, contact the Director of Marketing and Community Relations.

Throughout this workbook are references to the “Toolkit for Enrollment Management and Marketing.” Access downloadable templates and instructions for a variety of enrollment management and marketing activities by logging on to the Toolkit web site at www.archstl.org/EMP

As of August 2013, the following items can be found on this web site:

- ***Alive in Christ! Advancing the Mission of Catholic Education: Enrollment Management and Marketing Workbook***
- **Enrollment Management Plan Template and Worksheets**
- **Evaluation Rubric for Enrollment Management Plans of Catholic Schools**
- **Article on Good News “Evergreen” Brand from MOMENTUM, Sept/Oct 2010**

This toolkit is designed to be updated regularly by the Catholic Education Center’s Director of Marketing and Community Relations. Additional resources for “best practices” in enrollment management and marketing that are in progress to be posted in Fall 2013 include:

- **Enrollment Management Data Management and Tracking Tool**
- **Giving School Tours that “Seal the Deal”**
- **Video Production for Catholic School Marketing**
- **Social Media Tips for Catholic Schools**
- **Effective Catholic School Web Sites**

Check back often for new ideas and resources. Sign up to receive an e-mail notification when new resources are posted by sending a request to Sue Brown at suebrown@archstl.org. Principals are encouraged to add members of their EMCT to this e-mail distribution list.