



Enrollment Management & Marketing TOOLKIT

Evaluation Rubric for Enrollment Management Plans of Catholic Schools

Priority 5 of the Mission Advancement Initiative (MAI) states, “All elementary schools are expected to have a current creative and proactive enrollment management plan that will address how they will maintain and increase their school’s enrollment.” (Goal 2. Evangelization. Objective 2)

The MAI Enrollment Management Implementation Committee has designed this rubric by which schools may evaluate enrollment management plans (EMPs) with detailed descriptions of what each level of implementation “looks like.” Reflective of the **National Standards and Benchmarks for Effective Catholic Schools**, this rubric uses the same language for levels of implementation achieved for each component: “Exceeds Benchmark,” “Fully Meets Benchmark,” “Partially Meets Benchmark,” and “Does Not Meet.”

Note: The following adjectives imply an approximate degree of implementation: “All”=100%; “Most”=75+%; Some=50+%; Few=0-49%

EMCT = Enrollment Management Core Team

EMP = Enrollment Management Plan

Each benchmark contains a number of components (located in left margin). Levels of implementation are located to the right of each component.



Benchmark 1	<i>The school has an active enrollment management core team (EMCT) that assists the administration with development and implementation of the enrollment management/marketing plan (EMP).</i>
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Enrollment Management Core Team Membership	Exceeds	<p>The EMCT includes the pastor and principal and representatives of <u>all</u> of the following groups – school faculty and staff, school board members, school parents who are not board members, parish council members, and parishioners at large.</p> <p>A vehicle is in place for the EMCT to obtain input and feedback from students and alumni.</p> <p>The school has created a paid position for a Director of Advancement (full or part time).</p>
	Fully Meets	<p>The EMCT includes the pastor and principal and representatives of <u>all</u> of the following groups – school faculty and staff, school board members, school parents who are not board members, parish council members, and parishioners at large.</p>
	Partially Meets	<p>The EMCT includes the pastor and principal and representatives of <u>most</u> of the following groups – school faculty and staff, school board members, school parents who are not board members, parish council members, and parishioners at large.</p>
	Does Not Meet	<p>The EMCT includes the pastor and principal and a <u>few</u> of the <u>persons/groups</u> listed above – or – the school does not have an EMCT.</p>

Notes/Comments:



Enrollment Management Core Team Skills	Exceeds	<u>All</u> of the following “essential skills” are represented on the EMCT, or are otherwise accessible to the Team on an as-needed basis – expertise in marketing, finances, writing, graphic design, data collection/analysis, technology (including social media and web site), and ability to “cheerlead” for the school.
	Fully Meets	<u>All</u> of the following “essential skills” are represented on the EMCT, or are otherwise accessible to the Team on an as-needed basis – expertise in marketing, data collection/analysis, technology (including social media and web site), and ability to “cheerlead” for the school.
	Partially Meets	<u>Some</u> of the following “essential skills” are represented on the EMCT, or are otherwise accessible to the Team on an as-needed basis – expertise in finances, graphic design, data collection and analysis, and technology (including social media and web site), and ability to “cheerlead” for the school.
	Does Not Meet	A <u>few</u> of the following “essential skills” are represented on the EMCT, or are otherwise accessible to the Team on an as-needed basis – expertise in finances, graphic design, data collection and analysis, and technology (including social media and web site), and ability to “cheerlead” for the school.

Notes/Comments:



Enrollment Management Core Team Meeting Schedule	Exceeds	The EMCT meets <u>monthly</u> , or as regularly as determined necessary to stay on track with <u>all</u> timelines included in the EMP. An electronic communication vehicle such as a wiki or list serv is regularly used by the committee to communicate ideas between meetings. Committee meeting minutes or reports are provided to all school/parish constituencies.
	Fully Meets	The EMCT meets with sufficient regularity to stay on track with <u>all</u> timelines included in the EMP. An electronic communication vehicle such as a wiki or list serve is regularly used by the committee to communicate ideas between meetings.
	Partially Meets	The EMCT meets as frequently as possible to stay on track with <u>most</u> of timelines included in the EMP.
	Does Not Meet	The EMCT does <u>not</u> meet on a regular schedule.

Notes/Comments:



Enrollment Management Core Team Succession Procedure	Exceeds	<p>EMCT members commit to staggered terms of service.</p> <p>A running list of potential Team members and their skill sets is kept and reviewed <u>annually</u>. Potential team members are sought from both within and outside the school/parish community. At least one member of the EMCT reports to the school board at <u>each</u> meeting.</p>
	Fully Meets	<p>EMCT members commit to staggered terms of service.</p> <p>A running list of potential Team members and their skill sets is kept and reviewed <u>at least every other year</u>. Potential team members are sought from both within and outside the school/parish community. At least one member of the EMCT <u>regularly</u> reports to the board.</p>
	Partially Meets	<p>EMCT members commit to a minimum term of service. New members are sought from within the school/parish community. There is <u>some</u> method of communication between the school board and the EMCT.</p>
	Does Not Meet	<p>EMCT members do <u>not</u> commit to a term of service. There is <u>no</u> formal communication between the EMCT and the school board.</p>

Notes/Comments:



Benchmark 2	<i>The school's mission statement is a living document that guides decision-making processes in every aspect of the school.</i>
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Development of the Mission Statement - Representation	Exceeds	The mission statement was developed by the pastor and principal and representatives of <u>all</u> of the following groups – school faculty and staff, school board members, school parents who are not board members, parish council members, and parishioners at large. Student input was given appropriate consideration.
	Fully Meets	The mission statement of the school was developed by the pastor and principal and representatives of <u>all</u> of the following groups – school faculty and staff, school board members, and school parents who are not board members.
	Partially Meets	The school mission statement was developed by the pastor and principal and representatives of <u>some</u> of the following groups – school faculty and staff, school board members, school parents who are not board members, parish council members and parishioners at large.
	Does Not Meet	The school mission statement was developed with input from only a <u>few</u> of the persons/groups listed above – or – the school does not have a mission statement.

Notes/Comments:



Consultation Regarding the Mission Statement Draft Before It Was Finalized	Exceeds	Before it was finalized, input on the mission statement draft was obtained from a broad segment of <u>all</u> the populations identified in the “exceeds” category for Mission Statement Representation.
	Fully Meets	Before it was finalized, input on the mission statement draft was obtained from a broad segment of <u>all</u> the populations identified in the “fully meets” category for Mission Statement Representation.
	Partially Meets	Before it was finalized, input on the mission statement draft was obtained from a segment of <u>some</u> of the populations identified in the “fully meets” category for Mission Statement Representation.
	Does Not Meet	Before it was finalized, input on the mission statement was obtained from a segment of a <u>few</u> of the populations identified in the “fully meets” category for Mission Statement Representation.

Notes/Comments:



Review and Revision or Affirmation of the Mission Statement	Exceeds	The mission statement is reviewed <u>annually</u> by the pastor, principal, and school board, and input to either reaffirm or revise the mission statement is sought from school faculty and staff, school board members, school parents who are not board members, parish council members, and parishioners at large.
	Fully Meets	The mission statement is reviewed <u>at least every two years</u> by the pastor, principal, and school board, and input to either reaffirm or revise the mission statement is sought from school faculty and staff, school board members, school parents who are not board members, parish council members, and parishioners at large.
	Partially Meets	The mission statement is reviewed <u>periodically</u> (every three to five years) by the pastor, principal, and school board, and input to either reaffirm or revise the mission statement is sought from some of the populations identified in the “fully meets” category above.
	Does Not Meet	There is <u>no</u> periodic review of the mission statement and/or <u>no</u> input is sought regarding reaffirmation or revision of existing mission statement. Or, there is no school mission statement.

Notes/Comments:



Communication of the Mission Statement	Exceeds	The mission statement is prominent in all of the following: every classroom, all marketing materials (brochure, website, social media, informational packets, videos, etc.), school communications (handbooks, newsletters, constitutions of organizations, bulletins, annual reports, letterheads, etc.), school signage, and is referenced by pastor, principal, faculty and staff in presentations, speeches, letters, meetings, events, etc. whenever possible. Students are able to articulate the basic message of the mission statement as appropriate to their age/grade level.
	Fully Meets	The mission statement is prominent in <u>all</u> of the following: every classroom, marketing materials (brochure, website, social media, informational packets, videos, etc.), school communications (handbooks, newsletters, constitutions of organizations, bulletins, annual reports, letterheads, etc.), school signage, and is referenced in presentations, speeches, letters, meetings, events, etc. whenever possible.
	Partially Meets	The mission statement is prominent in <u>most</u> of the “fully meets” descriptors above.
	Does Not Meet	The mission statement is prominent in a <u>few</u> of the “fully meets” descriptor above.

Notes/Comments:



Use of the Mission Statement in Decision-Making	Exceeds	The mission statement is used <u>intentionally and consistently</u> as the reference point for making significant decisions (hiring, budgeting, policy and program development and evaluation, personnel evaluation, student discipline, etc.). It is consistently referenced in all written and oral reports as the basis for decisions.
	Fully Meets	The mission statement is used <u>intentionally and consistently</u> as the reference point for making significant decisions (hiring, budgeting, policy and program development and evaluation, personnel evaluation, student discipline, etc.).
	Partially Meets	The mission statement is <u>intentionally</u> used as the reference point for making <u>most</u> significant decisions.
	Does Not Meet	The mission statement is <u>not</u> intentionally used as the reference point for making significant decisions.

Notes/Comments:



Benchmark 3	<i>The Enrollment Management Plan contains recruitment and retention goals, strategies, action items (including persons identified as responsible for their execution), a timeline for each action item, and an evaluation process.</i>
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Enrollment Management Plan – Recruitment Goals	Exceeds	The EMP contains recruitment goals that create awareness and a positive impression of the school, and help to develop a pool of prospective students to accomplish <u>optimal</u> enrollment.
	Fully Meets	The EMP contains recruitment goals that create awareness and a positive impression of the school, and that develop a pool of prospective students that leads to <u>growth</u> of enrollment requiring additional personnel.
	Partially Meets	The EMP contains recruitment goals to attract a sufficient number of new students to <u>maintain</u> an enrollment that supports current personnel and programs.
	Does Not Meet	The EMP does <u>not</u> contain sufficient recruitment goals to attract a sufficient number of new students to sustain or stabilize the enrollment. Personnel and programs are vulnerable.

Notes/Comments:



Enrollment Management Plan – Recruitment Strategies	Exceeds	The EMP contains sufficient strategies and employs a tracking tool successfully in order to accomplish each recruitment goal effectively, as evidenced by growing enrollment. There is a <u>waiting list</u> for some/all grades, or plans are under consideration to expand some grade levels, build new classrooms, add staff, etc.
	Fully Meets	The EMP contains sufficient strategies and employs a tracking tool successfully in order to accomplish recruitment goals effectively, as evidenced by <u>growing</u> enrollment.
	Partially Meets	The EMP contains strategies to accomplish some of the recruitment goals effectively in order to <u>maintain</u> enrollment. A tracking tool is not used as effectively as it could be.
	Does Not Meet	The EMP contains a few strategies to accomplish some of the recruitment goals effectively, but enrollment continues to <u>decline</u> . The school does <u>not</u> use a tracking tool.

Notes/Comments:



Enrollment Management Plan – Recruitment Action Items	Exceeds	The EMP contains sufficient action items, and sufficient responsible persons to execute them, in order to accomplish all recruitment strategies identified, and to evaluate and revise, as needed. New activities are <u>regularly</u> developed to keep the EMP “creative and proactive.” <u>All</u> activities are recorded on a tracking tool, along with the appropriate response (“Thank you for attending Open House, taking a tour,” etc.) leading to the next step toward enrollment.
	Fully Meets	The EMP contains sufficient action items, and sufficient responsible persons to execute them, in order to accomplish <u>all</u> recruitment strategies identified, and to evaluate and revise them, as needed. All activities are recorded using a tracking tool, along with an appropriate response leading to the next step toward enrollment.
	Partially Meets	The EMP contains <u>some</u> action items and <u>some</u> responsible persons to execute them, in order to accomplish successful execution of <u>most</u> recruitment strategies. A tracking tool is used to track <u>most</u> activities and responses.
	Does Not Meet	The EMP contains <u>few</u> items and/or <u>few</u> responsible persons to execute them, in order to accomplish successful execution of <u>some</u> recruitment strategies. There is <u>no</u> tracking tool or system in place to track effectiveness of recruitment activities.

Notes/Comments:



Enrollment Management Plan – Timeline for Recruitment Goals, Strategies and Action Items	Exceeds	The EMP contains a short and long-term recruitment goal/strategy/action item timeline to project <u>seven years</u> into the school's future.
	Fully Meets	The EMP contains a short and long-term recruitment goal/strategy/action item timeline to project <u>three-to five years</u> into the school's future.
	Partially Meets	The EMP contains a short-term recruitment goal/strategy/action item timeline to project <u>less than two years</u> into the school's future.
	Does Not Meet	The EMP does <u>not</u> contain a recruitment goal/strategy/action item timeline to achieve future enrollment goals.

Notes/Comments:



Note: Retention refers to maintaining the original members of a cohort or class from kindergarten through graduation. “Replacement” is not retention. Example: If five of the original 30 kindergarteners are lost before graduation (even if another five or more are gained along the way), the retention rate for that class is 83%, not 100%. Retention rate in the following items refers to overall retention of a class of students from the primary point of entry (in most cases, kindergarten) through graduation.

Students who withdraw from the school due to a family move or other non-school related cause does not “count against” the retention rate. However, financial need does count against it, as retention strategies should address that cause for attrition.

Enrollment Management Plan — Retention Goals	Exceeds	The EMP contains retention goals designed to retain students through graduation, and to develop a long-term relationship with alumni. The overall retention rate (K-8) is <u>95%</u> or better, and recruitment and replacement has led to enrollment growth. (See Note above.)
	Fully Meets	The EMP contains sufficient retention goals designed to achieve an overall retention rate (K-8) of <u>95%</u> or better. (See Note above.)
	Partially Meets	The EMP contains <u>some</u> retention goals to address general causes of student attrition (including finances, discipline and dissatisfaction with school programs), in order to positively impact student attrition rates. The retention rate is below 95%. (See Note above.)
	Does Not Meet	The EMP contains <u>few</u> , if any, retention goals to address the causes of student attrition. The retention rate is below 95%. (See Note above.)

Notes/Comments:



EMP – Retention Strategies	Exceeds	<p>The EMP contains sufficient strategies to accomplish each retention goal. The EMCT has conducted market research to identify causes for local student attrition, and included in the EMP sufficient retention strategies to address those causes (finances, discipline and dissatisfaction with school programs), in order to grow school enrollment.</p> <p>A tracking tool is used effectively and contains regular retention activities for each strategy (“Step Up Day,” middle school program, active student council and student ambassador programs, etc.).</p>
	Fully Meets	<p>The EMP contains sufficient strategies to accomplish each retention goal. The EMCT has conducted market research to identify causes for local attrition, and included in the EMP sufficient retention strategies to address those causes (finances, discipline and dissatisfaction with school programs), in order to grow school enrollment.</p>
	Partially Meets	<p>The EMP contains <u>some</u> strategies to accomplish <u>some</u> retention goals.</p>
	Does Not Meet	<p>The EMP contains <u>few</u> strategies to accomplish retention.</p>

Notes/Comments:



EMP – Retention Action Items	Exceeds	The EMP contains sufficient retention action items, including sufficient responsible persons to execute them, in order to accomplish <u>all</u> retention strategies identified, and strategies are evaluated regularly during implementation.
	Fully Meets	The EMP contains sufficient retention action items, and sufficient responsible persons to execute them, to accomplish <u>all</u> retention strategies identified.
	Partially Meets	The EMP contains <u>some</u> retention action items and <u>some</u> responsible persons to execute them, to accomplish successful execution of strategies. Evaluation and revision are needed.
	Does Not Meet	The EMP contains <u>few</u> , if any retention action items and/or responsible persons to execute them in order to accomplish retention strategies.

Notes/Comments:



EMP – Timeline for Retention Goals, Strategies and Action Items	Exceeds	The EMP contains a short and long-term retention goal/strategy/action item timeline to project <u>seven years</u> into the school's future.
	Fully Meets	The EMP contains a short and long-term retention goal/strategy/action item timeline to project <u>three-to five years</u> into the school's future.
	Partially Meets	The EMP contains a short-term retention goal/strategy/action item timeline to project <u>two or fewer years</u> into the school's future.
	Does Not Meet	The EMP does <u>not</u> contain a retention goal/strategy/action item timeline.

Notes/Comments:



Enrollment Management Plan - Evaluation	Exceeds	The EMP has been evaluated using this rubric. <u>More than half</u> of the benchmarks satisfy the “exceeds” criteria. <u>All</u> others fulfill the “fully meets” criteria. Goals, strategies, action items, etc. are in development to fulfill the “exceeds” criteria in the future.
	Fully Meets	The EMP is evaluated using this rubric and <u>all</u> benchmarks fulfill the “fully meets” criteria.
	Partially Meets	The EMP is evaluated using this rubric. <u>Some</u> benchmarks meet the “fully meets” criteria.
	Does Not Meet	The EMP is evaluated using this rubric, but <u>few</u> benchmarks satisfy the “fully meets” criteria, or the EMP has not been evaluated.

Notes/Comments:



Benchmark 4	<i>The Admissions Process is designed to maintain contact from the first recruitment indicator through enrollment and retention (re-enrollment).</i>
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Admissions Procedures	Exceeds	The Admissions Process is a systematic and seamless progression from the first recruitment indicator (inquiry phone call, shadow visit, tour, etc.), through interview, testing/screening, application, acceptance and enrollment. Prospective families and students are advised at every step of the continuum. A variety of representatives of the school community have been involved in these contacts. For example, the third grade teacher sends a personal letter to parents of a prospective third grader. Or, a school board member invites the family of a prospective student to attend an open house or other school event.)
	Fully Meets	The Admissions Process is a systematic and seamless progression from the first recruitment indicator (inquiry phone call, shadow visit, tour, etc.), through interview, testing/screening, application, acceptance and enrollment. Prospective families are advised at every step regarding the continuum.
	Partially Meets	The Admissions Process contains <u>some</u> of the components listed above. Prospective families are advised of acceptance/non-acceptance.
	Does Not Meet	The Admissions Process contains a <u>few</u> of the components listed above.

Notes/Comments:



Benchmark 5	<i>The Marketing Plan reflects the recruitment and retention goals for each school year and the strategies and actions identified to achieve them.</i>
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Marketing Plan – Communications	Exceeds	<p>The marketing plan provides for <u>all</u> of the following: a functional and interactive school web site, social media, bulletin announcements, newsletters, submissions to <i>The e-Vangelizer</i>, etc., trained speakers and student ambassadors for parish/school/community events and to communicate with current and prospective school families, businesses and organizations in the community.</p> <p>The EMCT has developed additional creative communications that have proved to be successful.</p>
	Fully Meets	<p>The marketing plan provides for <u>all</u> of the following: a functional and interactive school website, social media, bulletin announcements, newsletters, submissions to <i>The e-Vangelizer</i>, etc. trained speakers and student ambassadors for parish/school/community events and to communicate with current and prospective school families, businesses and organizations in the community.</p>
	Partially Meets	<p>The marketing plan provides for <u>some</u> of the tools listed above.</p>
	Does Not Meet	<p>The school does not have a marketing plan or it provides for a <u>few</u> of the tools listed above.</p>

Notes/Comments:



Marketing Plan—Public Relations	Exceeds	The marketing plan provides for press releases about and/or invitations to special school events, community service, parish/school activities and student/teacher success stories, etc., to both internal and external audiences. The school has evidence of a significant response from media and target audiences to these communications.
	Fully Meets	The marketing plan provides for press releases about and/or invitations to special school events, community service, parish/school activities and student/teacher success stories, etc. to both internal and external audiences.
	Partially Meets	The marketing plan provides for <u>some</u> of the items listed above.
	Does Not Meet	The school does not have a marketing plan, or it provides for a <u>few</u> of the items listed above.

Notes/Comments:



Marketing Plan— Special Events	Exceeds	The marketing plan is designed to initiate and develop a relationship with families of prospective students. It includes <u>all</u> 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.
	Fully Meets	The marketing plan is designed to initiate and develop a relationship with families of prospective students. It includes <u>all</u> of the following: invitations to special events, meetings, liturgies and Catholic Schools Week events, including open house and school tours, upon request.
	Partially Meets	The marketing plan is designed to initiate and develop a relationship with families of prospective students. It includes <u>some</u> , but not all of the tools listed above.
	Does Not Meet	The school does not have a marketing plan, or it provides for a <u>few</u> of the tools listed above.

Notes/Comments:



Marketing Plan-Advertising	Exceeds	The marketing plan includes <u>all</u> of the following means of communication about the attributes of the school 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.
	Fully Meets	The marketing plan includes <u>all</u> of the following means of communication about the attributes of the school and special events: ads placed in local news outlets, on community bulletin boards, in local businesses, etc.; a high-quality, current (revised within the last three years) brochure; branded spirit wear/items.
	Partially Meets	The marketing plan includes <u>some</u> of the items listed in the “fully meets” descriptor.
	Does Not Meet	The school does not have a marketing plan, or it provides for only a <u>few</u> of the items in the “fully meets” descriptor.

Notes/Comments:



Summary

Upon completion of this assessment of your school's enrollment management plan (EMP), it is important to keep the following points in mind:

- **Celebrate** and **communicate** the results to all audiences in your school community. Stress all benchmark components by which your school's EMP "exceeds" or "fully meets" the implementation level criteria.
- **Identify** benchmark components that either "partially meet" or "do not meet" the implementation level criteria. Develop strategies to improve these areas in future EMPs, prioritizing them in order of urgency/importance, and setting a realistic timeline for completion of each. The EMCT should use the Enrollment Management Workbook and Toolkit to support their efforts to improve the implementation levels where the need has been identified.
- **Plan** to improve "fully met" benchmark levels of implementation to reach the "exceeds" level in future EMPs.

