



The State of the Independent School Admission Industry

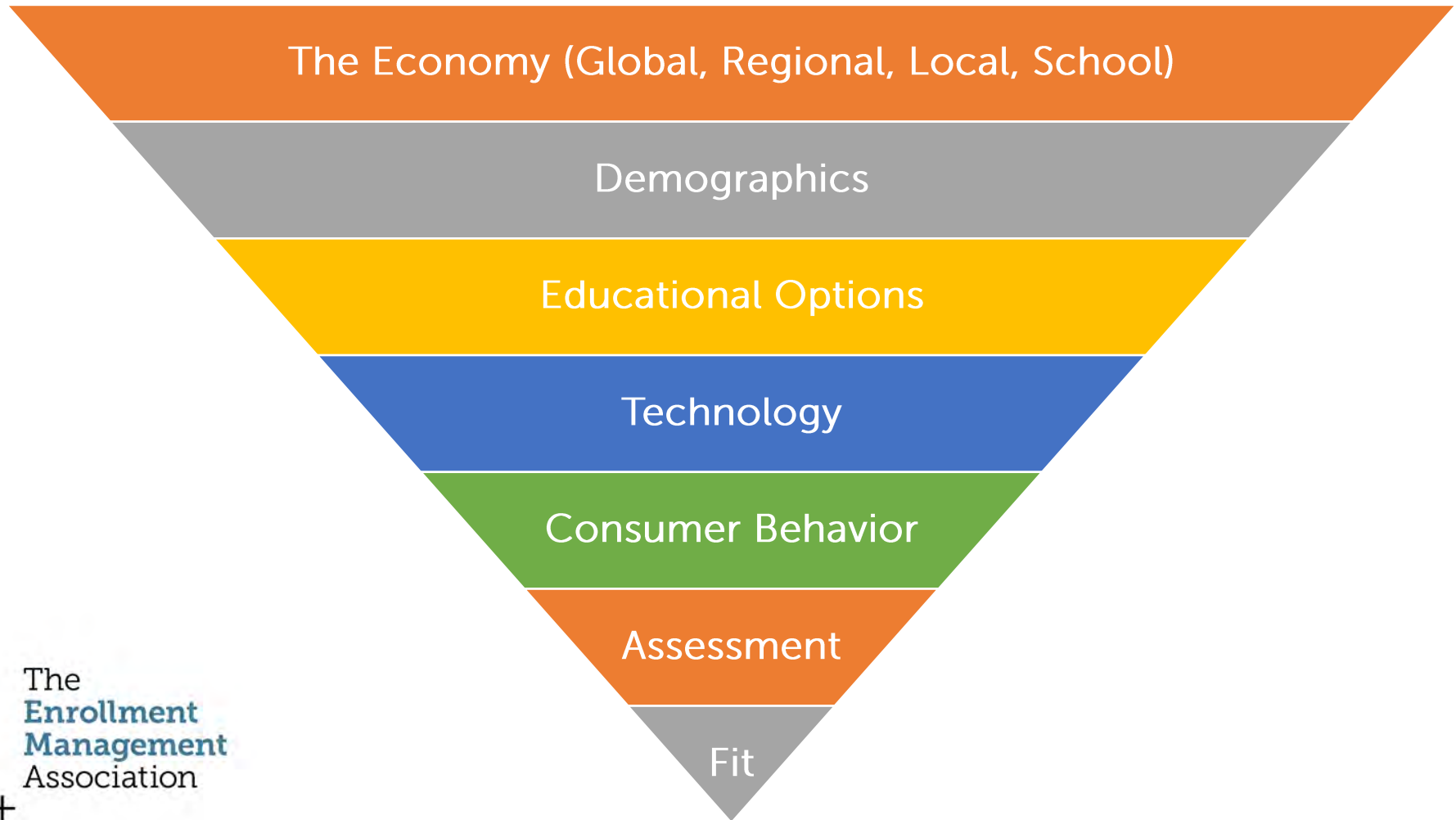
2017 IBSC Conference

Dave Taibl, Director of Outreach



At The Enrollment Management Association, we believe that the admission practices of the past will not sustain independent schools of the future. Everyday, we serve enrollment leaders through the best science, research, and training. Because when great schools enroll great students, everything is possible.

Forces Shaping the Funnel



The Realities ...

- Middle class is shrinking
- Gap between haves and have nots is growing
- School tuitions have risen faster than incomes
- Demand for financial aid is increasing
- Enrollment in NAIS schools is declining





Key Findings

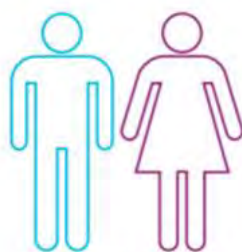
652 schools
participated in the
survey

A snapshot of the 652 responding schools:

School Type



Girls 7%



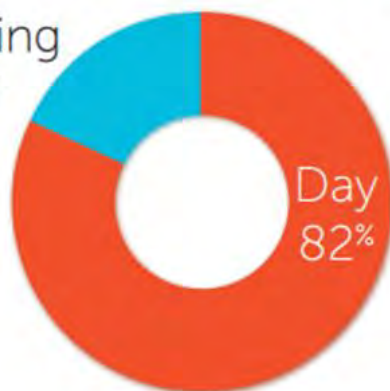
Coed 87%



Boys 6%

Boarding or Day?

Boarding
18%



Enrollment Size



Under 201



201-300



301-500



501-700

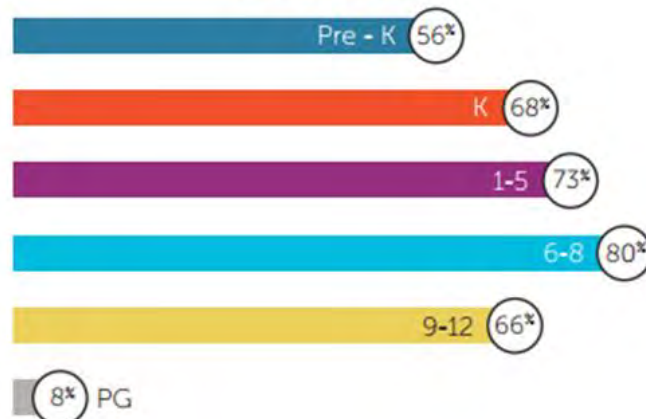


700-1,000



More than 1,000

Grades



* Throughout this survey, any reference to boarding school data includes responses from those respondents that identified their school type as boarding, boarding/day, and day/boarding.

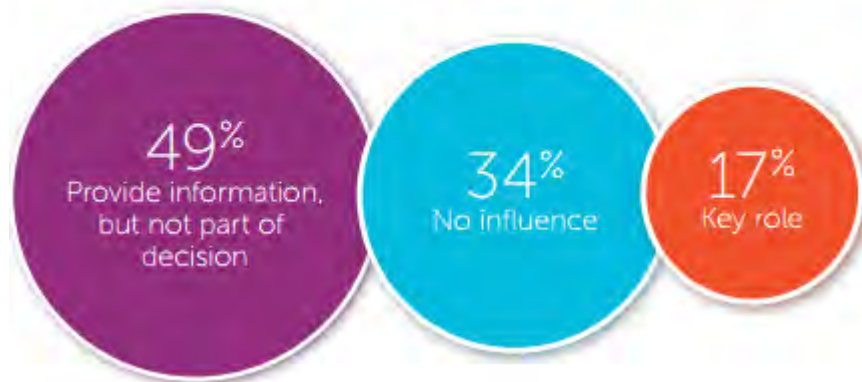


Admission directors have limited exposure to the board of trustees.

86% of admission leaders report to the head of school, and 83% of admission directors claim they are members of their school's senior leadership team—but only 37% regularly attend board meetings.

Admission directors have limited influence on school finance.

Role of Admission in Setting Tuition



Role of Admission in Setting the Financial Aid Budget

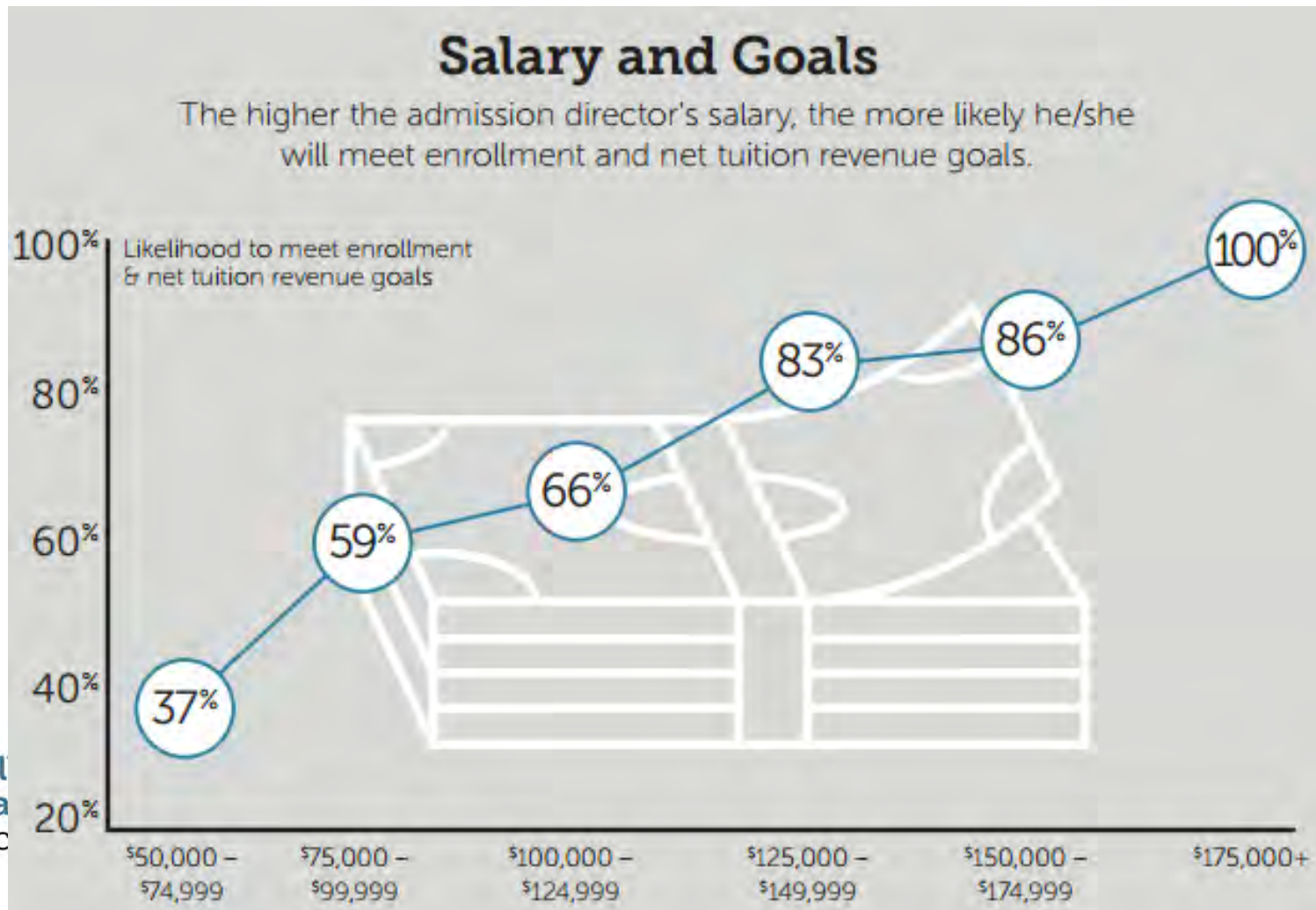


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An additional 3% reported financial aid was not offered at their school.

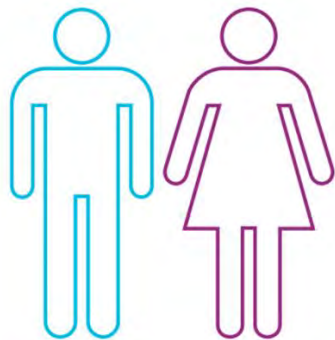
There is evidence to suggest that compensation is tied to enrollment results.



There is evidence to suggest that budget control is tied to enrollment results.

	Total	Admission office has key role deciding its budget	Admission office is not directly part of the budget decision	Admission office has limited influence on budget decision	Admission office does not manage budget
Met both enrollment and net tuition revenue goals	52%	62%	55%	47%	33%
Met enrollment goal but not net tuition revenue goal	12%	10%	11%	19%	10%
Met net tuition revenue goal but not enrollment goal	12%	8%	11%	16%	19%
Met neither enrollment goal or net tuition revenue goal	17%	15%	19%	16%	22%
Do not know	7%	4%	5%	3%	16%

Salary gaps persist.

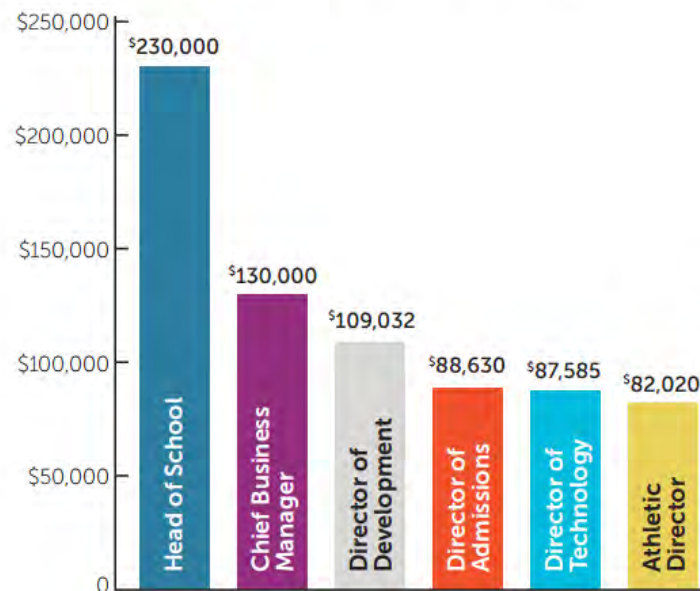


21% of women admission directors report a salary of \$100,000 or more, while 51% of male directors earn \$100,000 or more.

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Median Salaries for Administrators in Independent Schools



Source: NAIS Facts at a Glance 2014-2015

Admission directors seek and require skills in key areas.

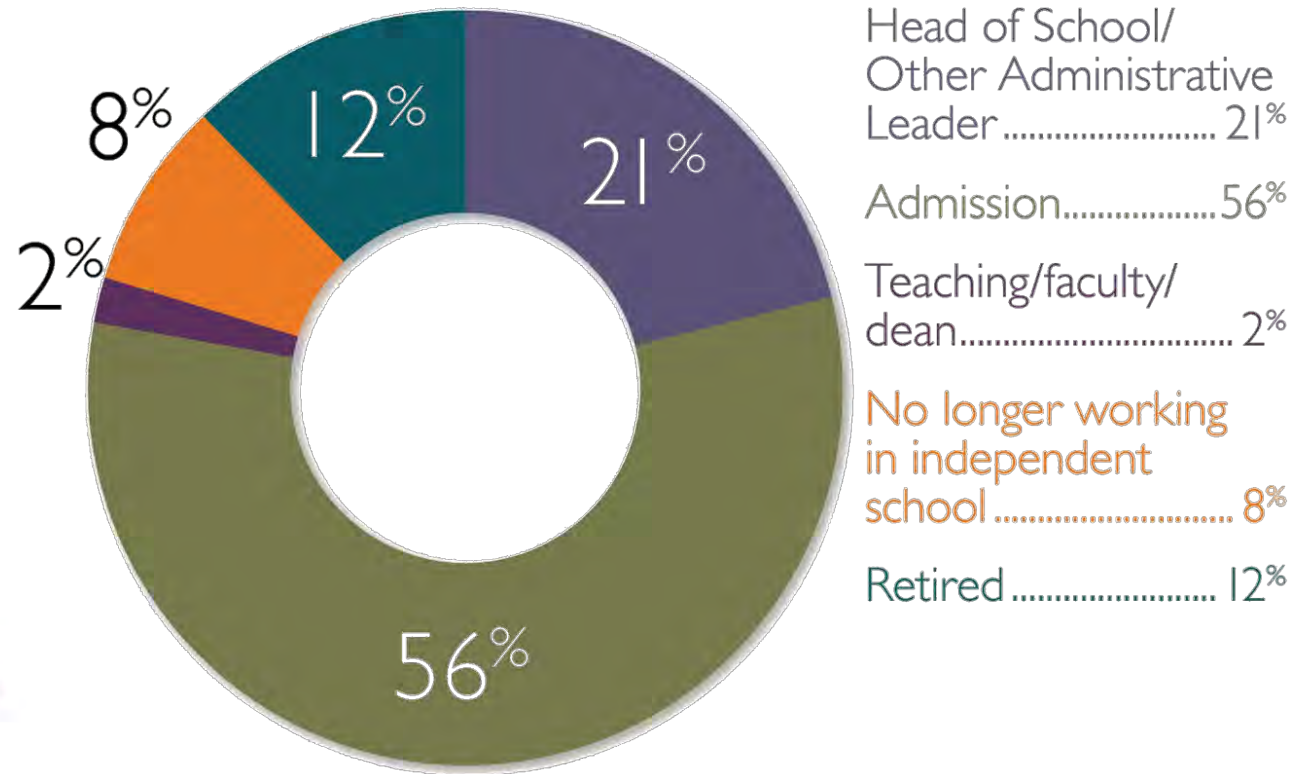
Areas of Skill Development

Marketing	58%
Predictive modeling and forecasting	56%
Use of data to drive decision making	55%
Strategic leadership	45%
Communications	40%
Admission office technology	38%
Student assessment/testing	25%
Finance/budgeting	24%
Personnel management	20%
International student recruitment	15%
Other	2%

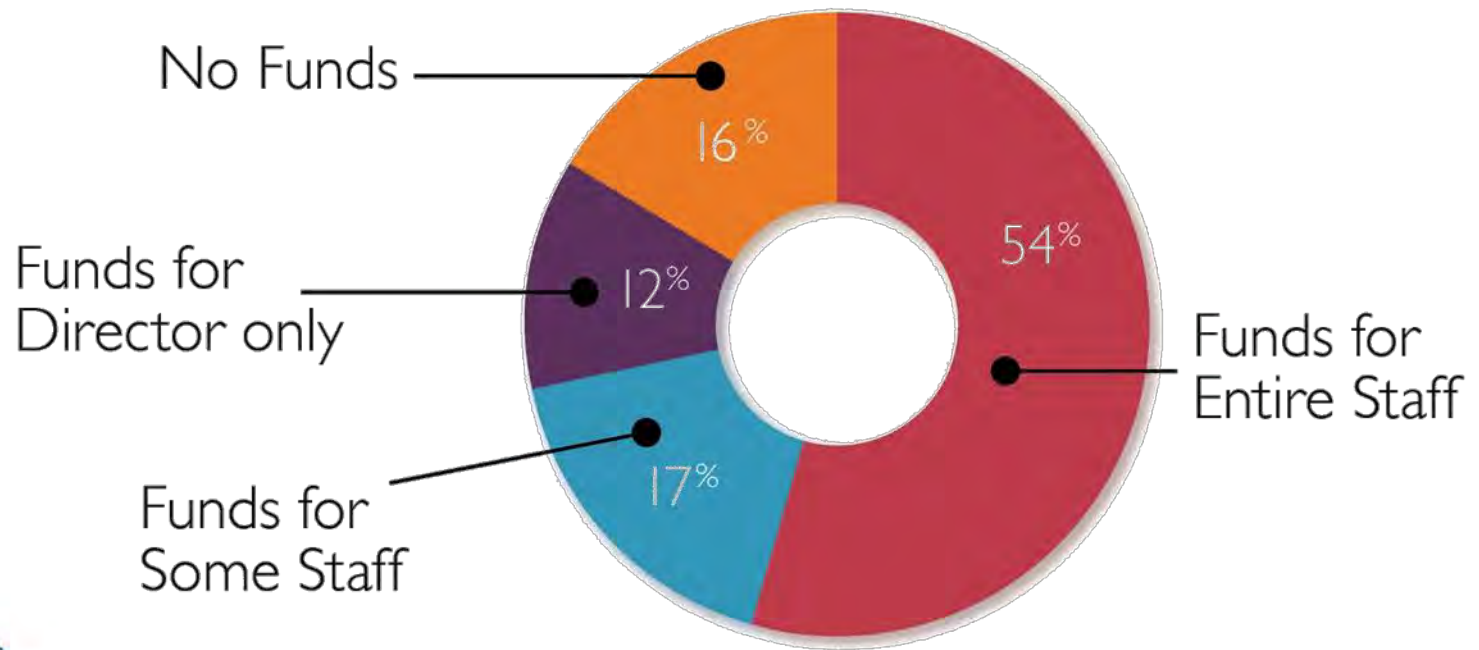
Attention must be paid to the admission leadership pipeline.



In Five Years...



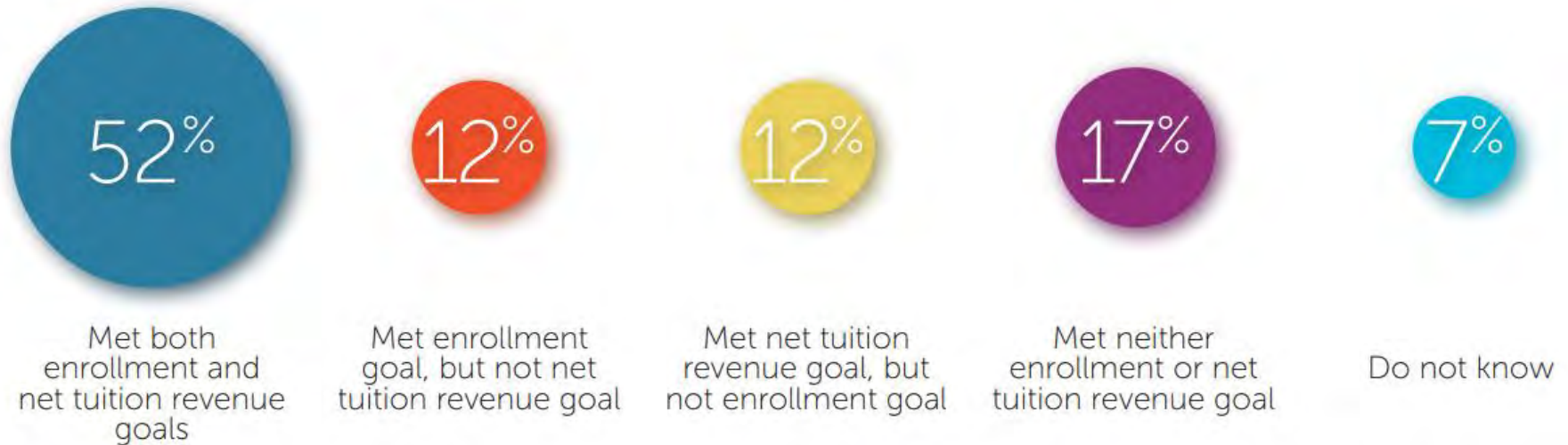
Some admission offices lack necessary staff professional development funds.



Enrollment challenges are real.

We received many more applications than available spots and managed an extensive wait list of students in most grades	11%
We received more applications than available spots and managed a small wait list of students in several grades	32%
We generally accepted all qualified students and reached our enrollment goals by the start of the year	27%
We did not reach our enrollment goals until several weeks into the school year	7%
We did not reach our enrollment goals last year	22%
I do not know	1%

Many schools are not meeting net tuition revenue goals.



Schools are relying on international students for tuition revenue.



97% of boarding schools AND
37% of day schools recruit
international students.



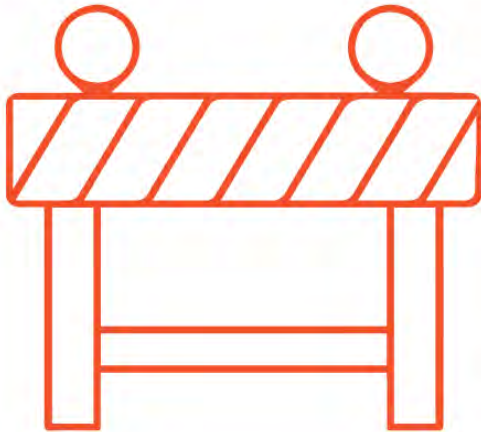
35% of schools provide
financial aid to
international students.

Schools are relying on merit aid as an enrollment strategy. +

58% of boarding schools and 37% of day high schools award merit scholarships.



Tuition remains a major barrier (and is a double-edged sword).



Nearly 50% indicate tuition
is a major barrier
to apply and enroll

Voluntary Attrition

Reasons for leaving:

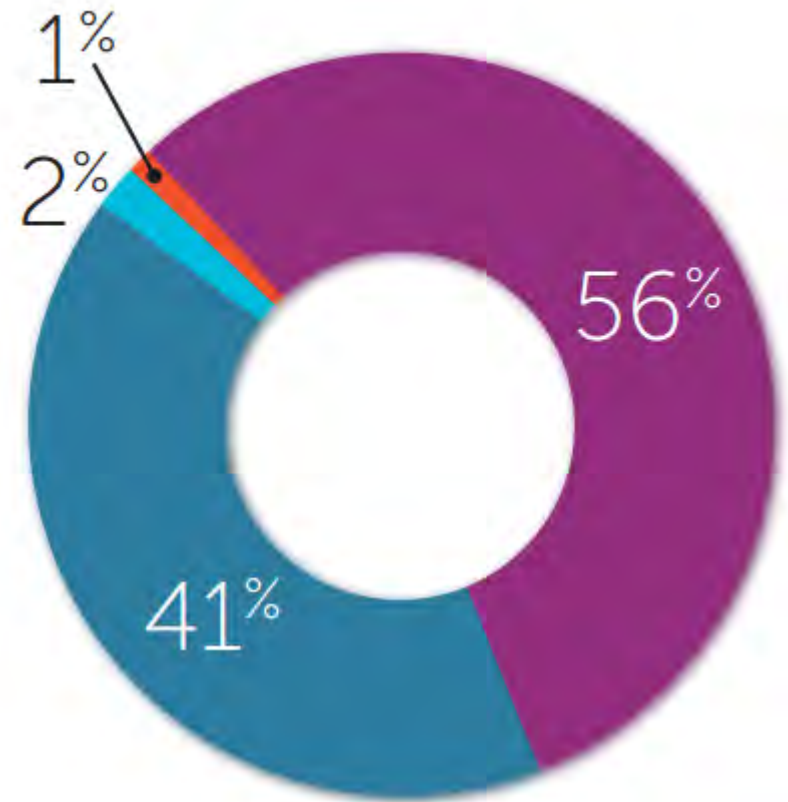


Parents Relocating



More Affordable Option

There is a possible disconnect between enrollment realities and future enrollment strategies.



Deliberately seeking to increase enrollment.....	56%
Seeking to maintain enrollment at current levels.....	41%
Deliberately seeking to downsize enrollment.....	2%
Do not know.....	1%



Interview



Transcripts



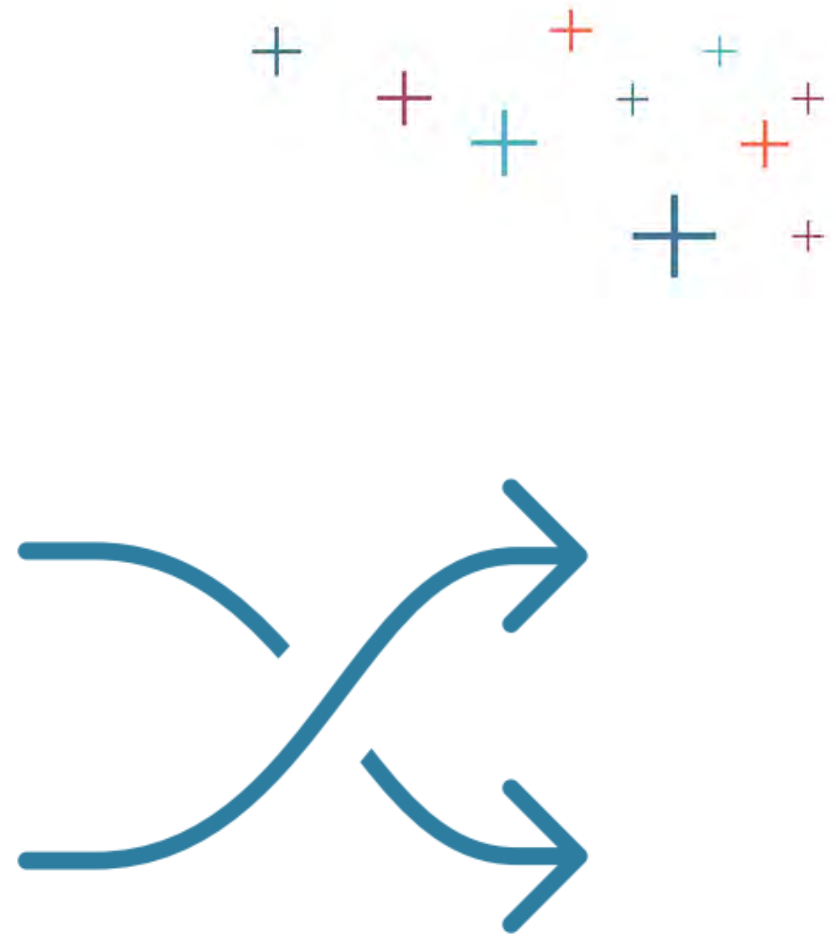
Teacher
Recommendations



A lack of standardization in student selection has negative effects.

69% do not rank or assign weights to individual application components in the selection process. Yet, schools that met enrollment goals are more likely to do so (34% vs 23%).

Schools (small schools in particular) should be concerned about cash flow problems associated with enrollment declines.



52% of schools lost three or fewer students after deposit. Nearly 30% lost between 4 and 10 students after deposit.

Despite the critical importance of retention in enrollment management, too few schools have formal structures to support it.



Just three-in-ten schools (30%) have a retention committee.

In six out of ten schools with retention committees, admission directors lead them.

Schools are
changing their
recruitment
tactics to serve
a new
customer.



Social Media



School Tours



Faculty/Staff Education



Videos of Campus Life



Hosting Community Events

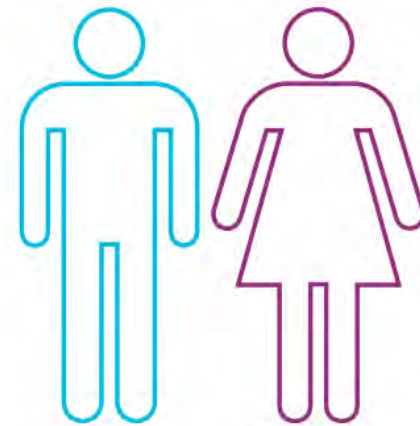
And they are likely shifting budget dollars to support these activities.



More than
 $\frac{1}{3}$ of schools
NO LONGER
print a viewbook.

Those with
viewbooks may
mail to all applicants
or just have them in
the admission office
waiting room.

Yet many lack a value proposition that differentiates them in the marketplace.



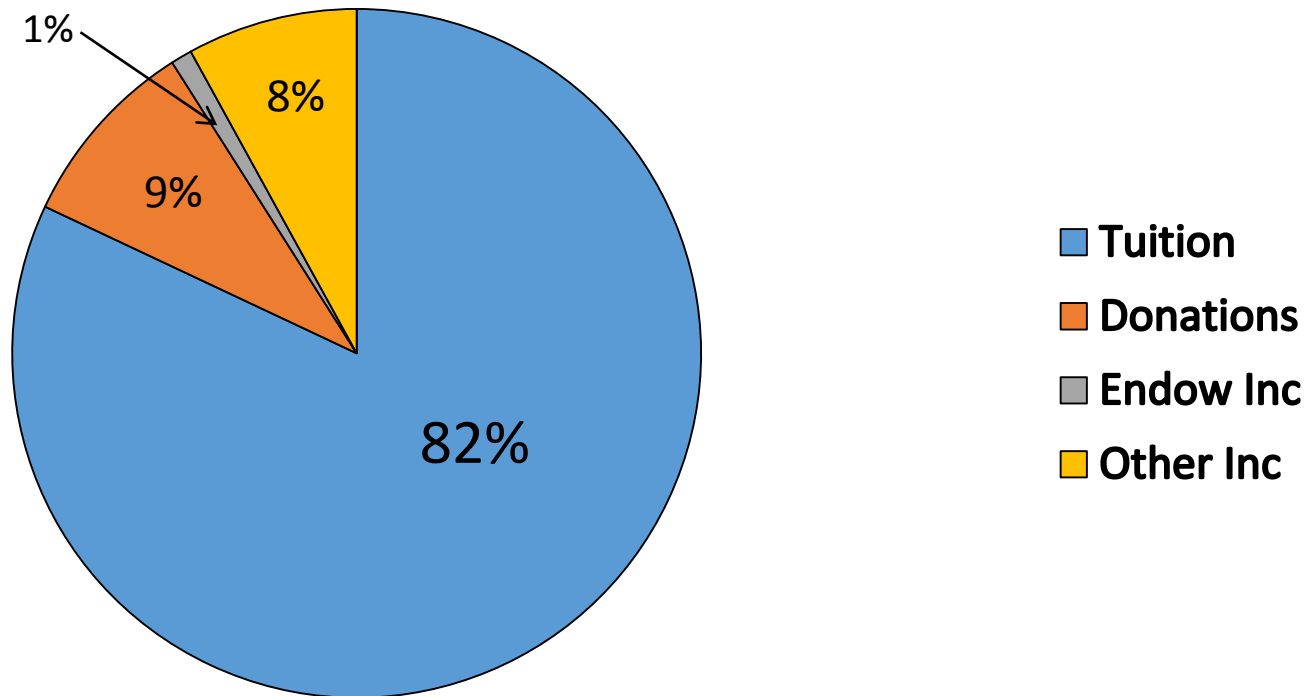
33% of schools indicate that the “development of the whole child” is the focal message of their marketing strategy.



3 Key Lessons Learned

1: Despite responsibility for a significant percentage of a school's revenue, some admission leaders lack key influence and training.

IND SCHL BUDGET – MEDIAN of ALL SCHOOLS
NBOA Fall Report, 2015



2: Admission leaders recognize a changing consumer but will require new tools and school-wide buy in.

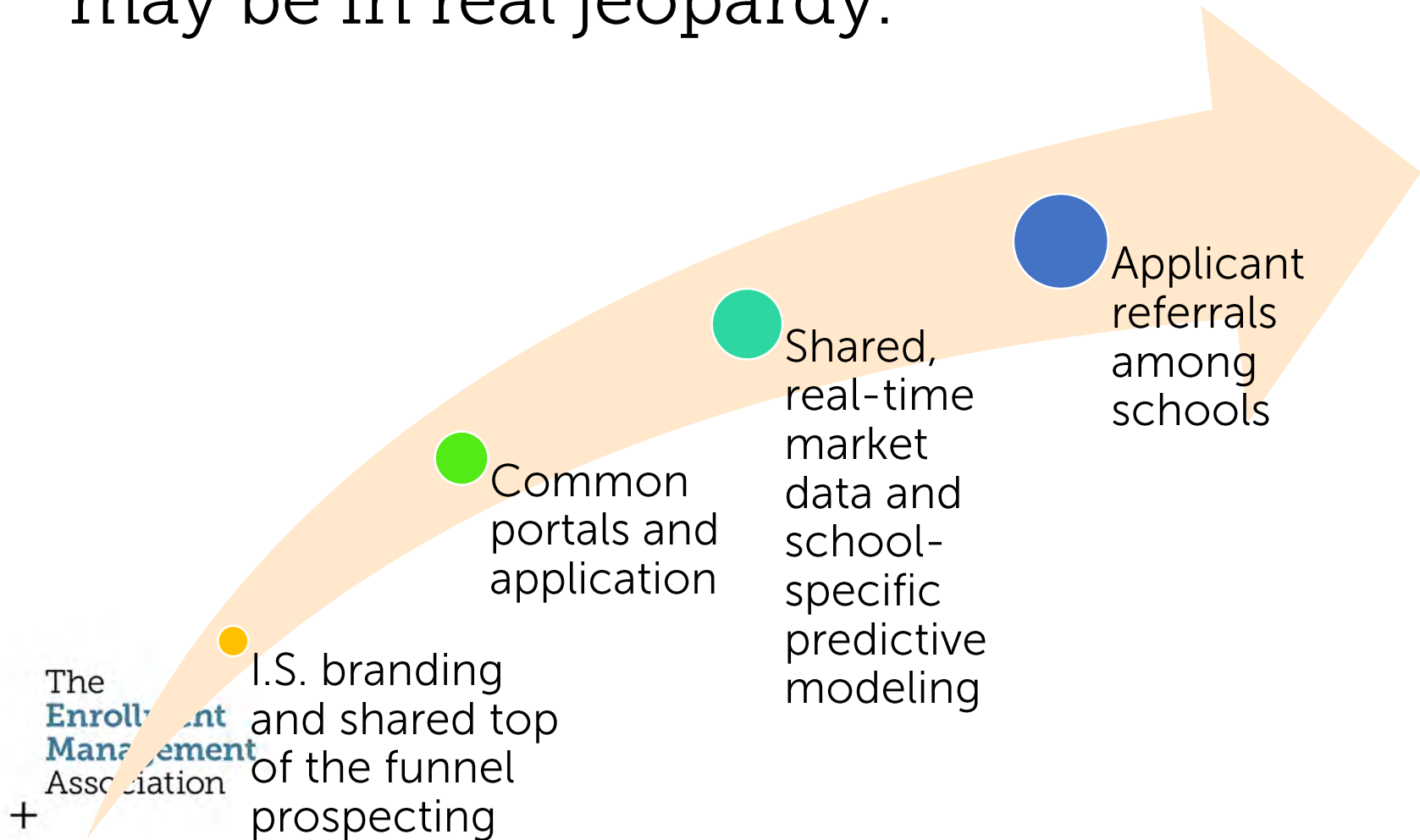


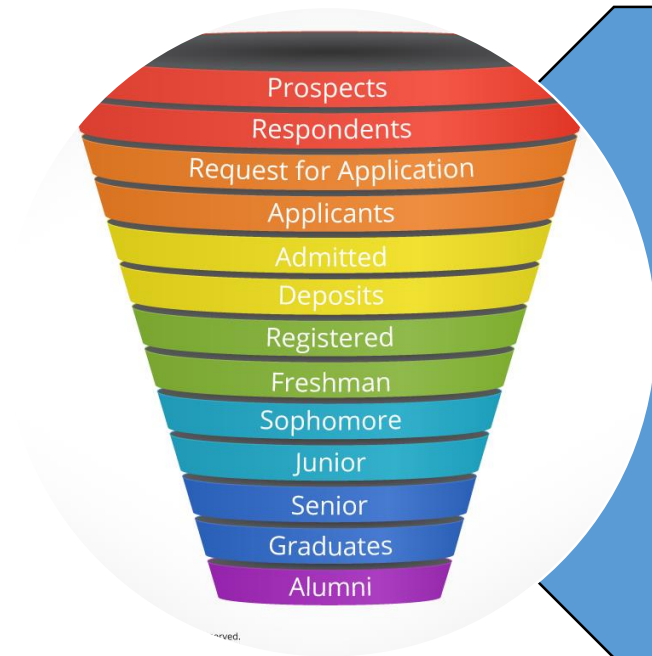
Remember: Every Interaction with Parents Reinforces (or not!) Their Purchase



- Parent-teacher conferences
- Disciplinary meetings
- Grades/teacher comments
- Athletic competitions
- Annual fund ask
- Making tuition payments

3: Unless independent schools come together in unprecedented ways, some may be in real jeopardy.





Embrace Enrollment Management

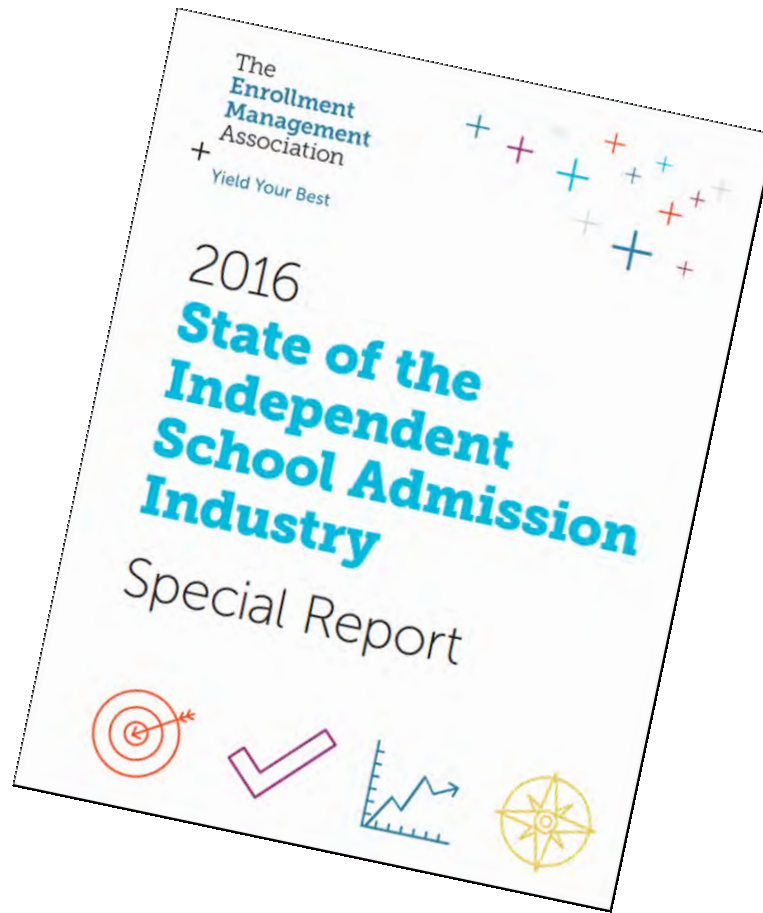
EM Defined

- *Enrollment management* is an organizational concept and a systematic set of activities. Designed to enable educational institutions to exert more influence over their student enrollments, enrollment management activities are organized by strategic planning and supported by institutional research. Processes are studied to guide institutional practices in the areas of new student recruitment and financial aid, student support services, curriculum development, and other academic areas that affect enrollments, student persistence, and student outcomes.

The Trustee Dashboard (NAIS)

EM-Specific Indicators of School Well-Being

Operating Budget	Operating Cash Flow
Admissions Pipeline ★	Endowment & Debt
Physical Plant	Student Turnover ★
Financial Aid ★	Tuition ★
Net Tuition Revenue ★	Faculty
Fundraising	Staffing



The report referenced today (and many more!) can be downloaded for free at
enrollment.org



THANK YOU!

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