EMA | SPRING 2024

THE Yield

Choosing the Right Path:

Using Data to Secure Your School's Long-Term Enrollment Strategy and Future Sustainability

Plus:

Return to Testing: the Post-Pandemic Effect

Influencers and Innovators: Former Enrollment Leaders on their Journey to Becoming Heads of School

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AMY GRAHAM, DIRECTOR OF ENROLLMENT MANAGEMENT, STEVENSON SCHOOL, CA

...WHEN I WAS LOOKING FOR RESOURCES TO LEARN MORE ABOUT THE JOB OF A DIRECTOR OF ENROLLMENT MANAGEMENT EMA WAS THERE. I used valuable resources for my interview and I have since gained more confidence through professional development leadership workshops.

MATTHEW FARLEY, DIRECTOR OF ENROLLMENT MANAGEMENT, JAMES RIVER DAY SCHOOL, VA

...OF THE TOOLS I HAVE ACCESS TO. EMA gives me the tools to continue my leadership in enrollment management and networking with like-minded enrollment colleagues who understand this work gives me the confidence to get through any challenges I may have.

ABENI BIAS, DIRECTOR OF ENROLLMENT MANAGEMENT, ST. MARY'S SCHOOL, CA

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Principal, Rational Partners

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Dear Colleagues,

I first met Bill Kummel of Rational Partners when he was building his business in the pre-pandemic years. If memory serves, we were attending the NBOA conference and Bill asked to meet for coffee. Dutifully, I went to the hotel's restaurant, shook hands, and within minutes was glued on the details of Bill's rich database. He was talking a mile a minute, but I was utterly transfixed by the data that Bill had built using publicly available 990s. "Do you want to see the list of the top 10 healthiest independent schools in this country using my metrics?" he questioned, already knowing the answer. The list was so surprising that I ended up in a 2-hour conversation with him on school sustainability issues. Fast forward to 2024, and Bill has created quite a business serving independent school leaders who need to better understand their financial condition and the "choices" before them/their trustees using those data-driven insights. Our lead article in this issue of *The Yield* features Bill Kummel on the economic considerations all enrollment leaders should understand. Once you've read that article, please make plans to bring your Head and CFO and join us this fall for a webinar featuring Bill and Rational Partners! We will be interviewing several of Rational Partner's past clients and they will share how they used his insights to drive internal change and improve financials at their institutions.

Speaking of data-driven insights, we've included a story in this issue on the "Return to Testing"; this is a post-pandemic trend picking up speed within many selective schools and colleges. EMA's Dr. Keith Wright covers this important topic by debunking some of the myths surrounding testing, and he shares new SSAT product features that include an extended score report offering more information to better identify each student's pandemic learning losses.

Also, let me call your attention to our *Yield* article featuring Heads of School who used to be enrollment leaders. EMA continues to build an impressive slide deck of former enrollment management leaders who are now school heads; several of these revered school heads spoke with us about their leadership work and strategy work first cultivated in their senior enrollment positions. This summer, EMA will be launching a podcast for Heads of School *by* Heads of School. Our pod hosts are former EMA trustees and school heads Suzanne Walker Buck (Western Reserve Academy, OH), Fran Ryan (Broadwater Academy, VA), and Ann-Marie Kee (Lakefield College School, Ontario).

As we look to the new academic year, I am excited to invite you to join what might be EMA's largest conference ever in Boston, and one of my most memorable ones as it will be my last hurrah! My retirement—or "Rewirement" as I'm calling it—happens next summer, and that means this conference will be my final one. Since my association career began in 1988 at 18 Tremont Street in Boston with NAIS, there is a certain full-circle satisfaction of being back in New England to close out this chapter. Team EMA has put together an incredible lineup of conference speakers and sessions not to be missed!

As always, wishing you the very best in your endeavors,

Heather Hoerle

HEATHER HOERLE
Executive Director and CEO
Enrollment Management Association

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BOSTON

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2024 SCHEDULE

Pre-Conference:
Tuesday & Wednesday
September 17 & 18

General Conference:
Opening Reception:
Wednesday Evening, September 18
Conference Program:
Thursday & Friday, September 19 & 20

Post-Conference:
Saturday, September 21

"The EMA staff cultivates a fantastic mix of professional development and personal connection."

FEATURED KEYNOTE SPEAKERS

Joseph E. Aoun
President,
Northeastern University

Bryan Stevenson
Executive Director,
Equal Justice Initiative

Joy St. John
Director of Admissions,
Harvard College

"Quality of speakers and unified sentiment across presentations was excellent. The EMA hub and resources were also set up well. Perfect balance of intensity and downtime, with just the right amount of sessions."

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EMA's forward-thinking program for aspiring leaders with at least three years of experience

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EMA's premier program for new enrollment management directors

> "The ATI training was extremely helpful and where I made my best connections."

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Christian Donovan, Head of School, Friends School of Baltimore (MD), Quentin McDowell, Head of School, Mercersburg Academy (PA), and Jill Thompson, Director of Admission, Phillips Academy (MA)

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Enrollment Management as the Cornerstone of Long-Term Institutional Sustainability: A Conversation with Rational Partners' William Kummel

BY EMILY CRETELLA

In 15 years, will your school's choices be more and better, as many and as good, or fewer and worse?

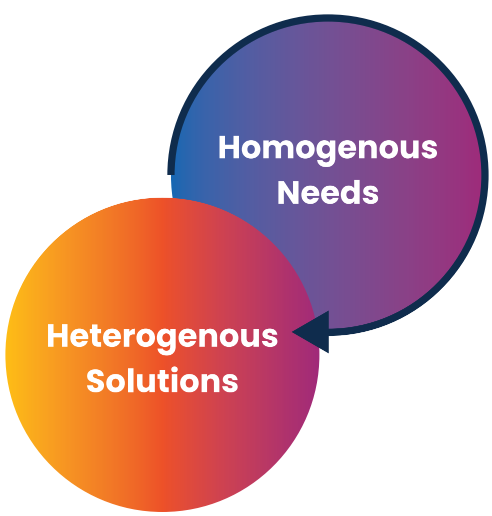
That is the key question William (Bill) Kummel wants independent schools to ponder—and he believes the right data and insights can change how school leaders answer and guide their schools forward.

"The question you solve for is, 'What actions can you take in the next five years to ensure your future choices?'" says Kummel, a consultant to independent schools in the United States, Canada, and Europe. "Here is the challenge: 80 percent of schools spend down their resources. They do not generate enough operating contribution to cover the capital maintenance of the school."

Kummel is the Principal of Rational Partners, a New York-based management consultant in institutional economics to independent schools that measures and evaluates near and long-term institutional market position, comparative advantage, and financial sustainability. The firm maintains a proprietary dataset of institutional sustainability on 1,000 independent schools in North America. Rational Partners pairs this model with proprietary client data to initiate data-guided conversations and strategic insights to help school leaders better understand their financial conditions and select choices that improve their long-term institutional sustainability.

"We identify opportunities to address a school's needs and advise leadership on how to consider and realize results," he says. "The needs of independent schools are the same. What's different are the solutions, and the decision criteria that each school's board and leadership team use to make their decisions: educational pedagogy, institutional competencies, community expectations, competitive landscapes, economic constraints, and moral compass."

NEEDS & SOLUTIONS



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In the last 10 years, Rational Partners has served independent school clients of all stripes—small (100 students) to large (4,000 students), geographically diverse, boarding, day, rural, urban, and recently, international. Yet Kummel's knowledge of independent schools extends beyond the numbers. He attended two independent schools, The Buckley School in New York City and Phillips Academy in Andover, MA. He credits these schools, as well as his undergraduate education at Yale University, with cultivating his deep curiosity and desire to provide useful information to inform long-term business strategy.

Given the breadth of Rational Partners' work on solutions for independent schools, The Yield sat down with Kummel to hear his thinking on the role of enrollment strategy in his current work.

DECISION CRITERIA

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You have served many institutions in the last few years. What patterns of success do you see in the business model?

William Kummel: On the success side, three factors matter. First, the school's leadership—including enrollment leaders—looks at the strategic options as a portfolio: every challenge is multi-dimensional no one thing gets you in, **no one thing gets you out of a particular challenge.** Second, they prioritize well; they distinguish between what is nice and what is necessary, as well as what is strategic and what is familiar. This is critical when schools consider strategic plans and campus planning. Finally, school leaders see institutional sustainability as a team sport.

Conversely, where do you see patterns of challenge for your clients?

WK: One of the biggest challenges is: are they ready? Is the school ready to do hard work? Does the institution have a real appetite and capacity for change? Part of our job is to build the appetite for rational and responsive change. Another is the time horizon. Schools need the right balance between addressing acute and chronic financial health challenges (and pain). And another challenge is speed—what rate of change will leadership undertake? **For challenged schools, the greatest threat is time**, as they are consuming cash. Lastly, leaders need to understand the school's balance between what Rational Partners refers to as *Program and Plant*.

LEVERS

ECONOMIC (INSTITUTIONAL SUSTAINABILITY)

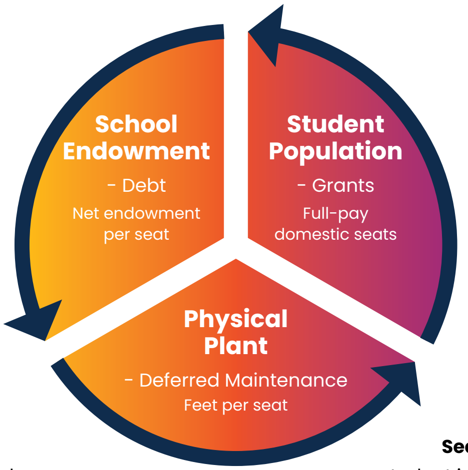
Population	Ratio of full-pay to grant students
Price	Average price for full-pay student
Grants	Average award per student
Productivity	Students per full-time equivalent employee (FTE)
Philanthropy	Net philanthropy per student
Plant	Square fee per student

***Program* versus *Plant*... can you explain? Let's dive deeper into your economic theories relative to the independent school model.**

WK: The tuition-driven economic model of independent schools is a very good and resilient one. It can take a fair amount of variability and pressure, but only to a certain limit. There are Economic Levers at each independent school that impact institutional sustainability, and we define those as Population, Price, Grants, Productivity, Philanthropy, and Plant. Plant is the square feet that your school has per student. Why does this matter? **You have a certain amount of funds. The more you spend on *Plant*, the less you have for *Program*.** Rational Partners believes a high number of square feet per student increases the cost of maintaining the buildings and campus. There is a tendency in the independent school industry to build more. Some would describe it as a facilities race. I might describe it as the amusement park approach to independent school management: you must have the latest ride to sell tickets. So, it's not surprising that the costs of schools have gone up faster than the rate of inflation, given this urge to grow facilities more and more.

KEY ASSETS

LONG-TERM



Seat = Enrolled student in September

There are also **Key Assets** that impact schools long term: ***School Endowment, Physical Plant, and Student Population (Enrollment)***. The most valuable asset, worth more than the other two combined, is Student Population (in EMA's vernacular, "enrollment"), particularly the full-pay students.

Why is this so important? The traditional model of independent schools is 80/20: 80% full pay and 20% grants; Rational Partners' definition of "grants" is all-encompassing and includes financial aid, merit scholarships, and tuition remission. Several markets around the country are still in the 80/20 rule, meaning they have a 4:1 ratio of full-pay to grant (financial aid) seats.

Now, let's look at an example of how **small changes at a school can have a profound impact on long-term sustainability.** If a school has historically been 80% full pay but drops to 67%, that means they're shifting from a 4:1 to a 2:1 full-pay to grant–seat ratio (a 40-student swing in a 300-student population). They've lost half of the original formula's leverage. What's going to compensate for that loss? Is it going to be price (e.g., a higher price tag), a lower cost structure (e.g., fewer instructors and/or administrators), fewer square feet (e.g., retiring buildings to avoid capital maintenance costs), or more philanthropy? Something has to change.

As the Head of School, a member of senior leadership, or a trustee, you're faced with choices. **Which resources do you consume in the present versus those you conserve for the future?** If you have an economic shift like the one I've just described and you don't compensate for it, you will run down your assets and run out of working capital unless substantial philanthropy steps in to save the school. That's how schools end up drawing money from their endowment, taking on debt, or deferring capital maintenance. It's a matter of time before those choices start to catch up to you, making your institution critically challenged and fragile.

You often share the importance of institutional enrollment strategy in your presentations. In fact, you've embraced the term Chief Revenue Officer for the role of the Enrollment or Admission Director. Why?

WK: For the typical independent school, 95% or more of the operating expenses are covered by the enrollment side, and around 5% on the philanthropy side. You might even make the case that material financial support (e.g., gifts that exceed 10% of the annual tuition price) is dependent on the choices made when you enroll students in your school. When you begin to think about enrollment as stewarding, shaping, and growing the most valuable asset of the school—the school community—it really is a Chief Revenue Officer role.

Enrollment professionals need to understand the full business model so that they can appreciate where the real opportunities are that will benefit the whole enterprise. As the Chief Revenue Officer, you're selling a continuity product—you're providing service until a family says stop or a student graduates. It's not one sale; there's always an aspect of reinforcing the initial sale.

METRICS
THAT MATTER

Average Tenure	Ratio of total students to new students
Population Shape	Number of lower, middle & upper school students by grade
Price Spread	Ratio of PK/KG to upper tuition, # prices and $ steps
Grant Distribution	Awards as ratio to tuition and mandatory fees by quintile
Labor Productivity	Students per FTE. Students and employees per section
Plant Productivity	Feet per student and change over 30 years
Philanthropy Share	% of expense covered by net philanthropy

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There are certain **Key Performance Indicators** that will help Chief Revenue Officers be successful. They should understand the points of leverage in the school's business model: average student tenure and tuition model are only two of a large set. They should understand the school's market position, competitive advantage, and price in the marketplace. They should be able to articulate student outcomes at every division level. And, they should like to sell and be good at it.

Similarly, at times we refer to the Head of School as the Chief Retention Officer—and it's why we believe that in the future a third to half of first-time Heads of School will come from the enrollment side. Why? Because of their ability to sell—and when we say "sell," we mean "build a community". They have the capacity and experience to describe the community and the value that it brings to those who can join it.

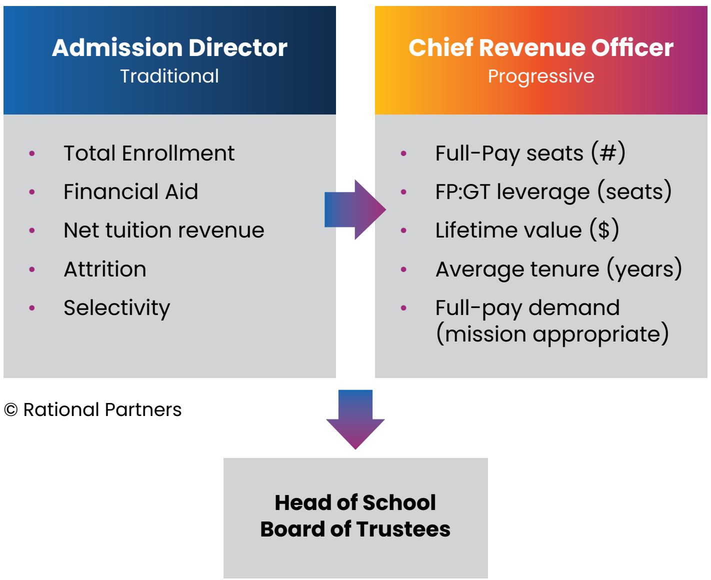
Let's talk numbers. You've built a database unlike any other for independent schools. What were you seeking to create originally, and what have you discovered from the data that you've gathered?

WK: Our goal with developing the database was to build a rational model of school economics that represents short-, mid-, and long-term financial performance that covers more than 10 years. We wanted to present financial sustainability in an accessible format so that it's highly usable not only by senior leadership but also by trustees. We wanted it to be comparable so that you can analyze a school over multiple years, compare schools within segments, or evaluate the performance of segments.

Some big takeaways from our data show that, first, between 2011 and 2020 (the pre-covid period), sustainability was relatively consistent. Second, mid-size and large schools had comparable and better economics than small schools. Third, primary schools also had a harder set of economics than secondary and K-12 schools.

Another insight: an industry challenge is capital maintenance—the full cost to maintain the current campus in its current condition—which includes light renovation every 20 to 25 years, and going down to the steel and studs every 40 to 50 years. Capital maintenance is the amount to spend each year or set aside in reserve to maintain the campus in its current condition without needing to draw down the endowment, take on additional debt, defer capital maintenance or raise capital. It's like owning a home and knowing that the roof is going to need replacement every few decades.

TWO VIEWS
INSTITUTIONAL HEALTH



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What's interesting is that on average the schools are only covering about 60% of the capital maintenance cost through their operating contribution. Those are a few examples of the insights to be gleaned from data like this.

THREE BUCKETS

JOHN GULLA'S MODEL OF INDEPENDENT SCHOOLS

Schools with significant financial and/or reputational capital, and/or admission demand and that are relatively immune from many of the current challenges.

Schools that recognize the challenges and threats and that are actively, creatively attempting to change.

Schools that are continuing with "business as usual" without recognition, or at least a meaningful plan, to adapt to a changing landscape and that are most at risk.

John Gulla's three buckets are a way to help independent schools determine their level of risk in the face of change.

You speak about Edward E. Ford Foundation's Executive Director John Gulla's three bucket heuristic model of institutional sustainability. Can you talk about your experience working with client schools inside of each of these buckets? For those schools in Bucket 3, is the future completely dire?

WK: This model is a useful way for schools to think about sustainability. As far as institutional economics, Bucket 1 schools are balanced for the long term. They have the operating contribution to cover the capital maintenance, and usually additional amounts that go to building their endowment or working down any deferred capital maintenance. Interestingly, the economics of Bucket 2 vs. Bucket 3 are not materially different. The difference is that Bucket 2 schools are aware of the need to address their gap in institutional sustainability, while Bucket 3 schools are not.

This is where new models of thinking and collaboration can make an impact—and why we are researching business models such as strategic multicampus schools, which reinforce one of our core ideas: **independent does not necessarily mean doing it on your own**.

One strategic multicampus school model looks like this: you have multiple Primary School campuses (Satellite) feeding into a single Upper School Campus. This allows you to increase the geographic area from which your school pulls while offering a higher service level to parents and students in those areas.

Schools adopting this model are starting to change the dynamics of the average tenure of their students. More students start at the school earlier and they last longer.

We're hoping that studying this further will spur other schools to look at this and say: **Does collaboration and consolidation offer us a path of greater institutional sustainability?**

It's not going to be the right strategy for every school, because not every school is geographically positioned in this way. But it does start to raise some interesting answers to the question of how to build a more robust revenue model with a better cost structure. We see real potential for collaboration between schools going forward to solve economic challenges.

Independent schools face an acute need for new business models. Rational Partners, in partnership with Friends Council on Education and with grants from the Edward E. Ford Foundation and BLBB Charitable, are conducting a nationwide research study on Strategic Multicampus Schools (SMCS). This project aims to survey, analyze, and report on the structure and effectiveness of schools operating in satellite, parallel, or coordinated arrangements, whether through collaboration, consolidation, or organic growth. The hope is to provide analysis and results from schools with novel approaches to school composition that produce the financial sustainability solutions independent schools are seeking in this era. This resource will serve as a toolkit to unlock creative thinking with real-world performance examples that utilize novel pathways to sustainability. As Rational Partners has worked through the research, it has become increasingly apparent there are far more SMCS schools than first expected (100+ and growing). This project has proven to be full of unexpected turns and fresh insights, with findings to be shared later this year.

WILLIAM (BILL) KUMMEL

William (Bill) Kummel is the Principal of Rational Partners, a New York-based management consultant in institutional economics for independent schools. The firm's work critically evaluates near and long-term institutional financial sustainability, market position, and comparative advantage. The approach applies deep experience in finance, logistics, and marketing to address the unique complexities of independent schools. A product of independent schools—The Buckley School (of New York City) and Phillips (Andover) Academy— Kummel received a BA in architecture from Yale and an MBA and JD from Georgetown. Connect with Bill at wkummel@rational-partners.com.

If you had one piece of advice for EMA's 1200+ members, what would it be?

WK: One of the pieces of advice that we provide our clients is that sometimes it takes a couple of passes with this type of work to get a real feel for it—because everybody likes the quick answer (e.g., What is the one thing we can do to for a big change? What is the target metric we need to get to?). And we can give a quick answer. But if you're trying to do something material and sustainable, it takes time to get your strategy right. Start now.

LEARN FROM RATIONAL PARTNERS

EMA is pleased to offer members the opportunity to attend a webinar with Heather Hoerle and Bill Kummel this fall to learn from schools that have implemented Rational Partners' work and changed their enrollment toward success in long-term institutional sustainability.

For those who register in advance, Rational Partners will furnish their school's financial sustainability analytics (for schools that file Form 990 and Rational Partners covers) to help you begin the deeper conversation at your institution. As financial sustainability is a team sport, bring your school's head, CFO, board chair, and/or finance chair, and of course yourself! If you are interested in attending with your leadership team, visit enrollment.org to learn more.

Accept predictability.

"It is not that testing is the driving factor in our school's student selection process, but it is part of the overall mix that allows our team to properly assess students and to better support them when they arrive on our campus."

-Lawrence Sampleton, Associate Head of School for Enrollment Management and Financial Aid, St. Stephen's Episcopal School (TX)

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Return to Testing: The Post-Pandemic Effect

BY KATELYN FORERO

Debate over the merits of standardized assessment has swirled for years, pre-dating the COVID-19 pandemic and the 2019 college admissions scandal. In 2020 when the pandemic rendered it nearly impossible to require standardized admission assessments, both independent schools and higher education institutions were pushed into test-blind or test-optional policies. After four years of pandemic-related disruption, many schools are now examining, and in some cases revising their admission testing policies.

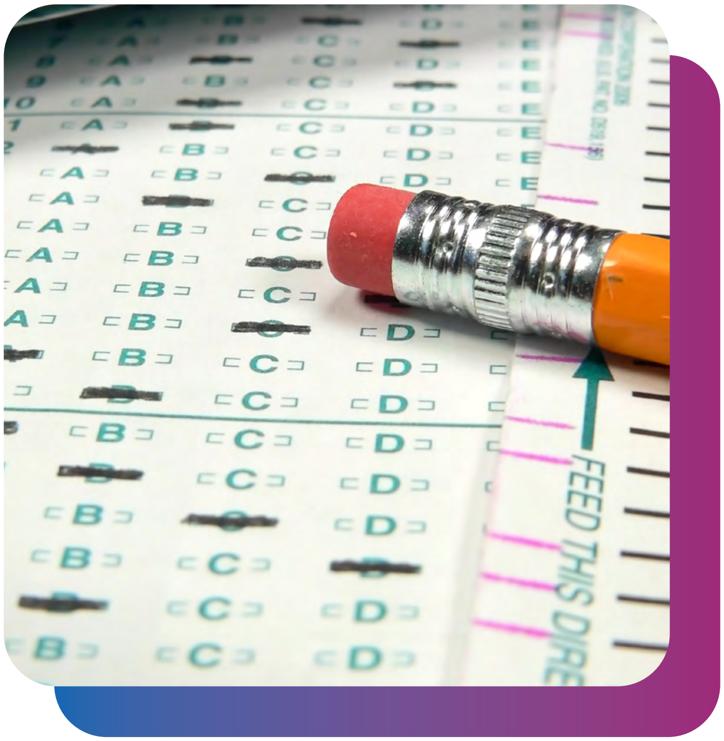
While the decision to "return to testing" is not one-size-fits-all, these shifts in higher education highlight important themes that can be helpful to independent school enrollment managers wrestling with the conundrum of how to build a fair and objective admission process in a post-pandemic world.

The Dartmouth Decision: Emphasizing Contextualization as Path to Access

In early February 2024, Dartmouth College made headline news by announcing their plans to reinstate their standardized testing requirement for the class of 2029. Citing new research conducted by three Dartmouth economists and a Dartmouth sociologist, the study showed that "test scores represent an especially valuable tool to identify high-achieving applicants from low and middle-income backgrounds; who are first-generation college-bound; as well as students from urban and rural backgrounds [. . .] contrary to what some have perceived, standardized testing allows us to admit a broader and more diverse range of students."

Dartmouth researchers and admission officers noted that students with scores that would have been considered "strong" in the context of their high school but fell below Dartmouth's published "mean" score, in some cases chose not to submit their scores during the test-optional years. Often, the study found, the presence of those scores would have been "additive" to the student's candidacy. The Dartmouth team then took this one step further by arguing that "the absence of such scores underscores long-standing misperceptions about what represents a "high" or a "low" score; those definitions are not binary" (Update to Testing Policy, 2024).

In a February interview with *Inside Higher Ed*, Dartmouth Admission Dean Lee Coffin said of the contextualization of standardized test scores, "I don't think higher ed has done a very elegant job of being clear about this. One of the things I'm committed to doing as we reactivate [our test requirement] is imagining new ways of reporting our test profile, giving students more opportunities to see that 'Oh, this is a really good score in my context.' I think that's another post-pandemic opportunity. It's not just that we paused and unpaused and are pretending it's just 2019 all over again. We've learned things during the last four cycles that have been illuminating, and we've baked this contextualized view of testing into our reading. I don't know if everybody's done that, but we've done it."



Greenhills School, Michigan: An Independent School's Process for Returning To Testing

Prior to the pandemic, Greenhills School in Ann Arbor, MI, decided to shift to test-optional to decrease barriers and increase access for students who may not otherwise consider an independent school education. According to Sylvester Cutler, Director of Enrollment Management at Greenhills School, the School quickly began to feel the absence of standardized test scores amid the pandemic, particularly when "local public schools started to actively encourage their teachers NOT to submit recommendations on behalf of students looking to leave the district."

The Greenhills School enrollment team began to discuss a potential "return to testing" in the summer of 2022. Mr. Cutler reached out to other enrollment directors across the country to learn more about the role and impact of standardized testing in their admission and review processes. From those conversations, he eventually connected with Dr. Nathan Kuncel of the University of Minnesota, a psychology professor who specializes in the structure and prediction of performance in academic and professional settings. Mr. Cutler and Dr. Kuncel had several illuminating conversations about ways to utilize testing in Greenhills' admissions review and ways to use those scores to set new students up for long-term success.

At Greenhills School's annual team retreat in the spring of 2023, Mr. Cutler presented the data he gleaned from his conversations with Dr. Kuncel and other enrollment directors. The Greenhills team spent half the day debating the merits of testing in their process, the impact on the admissions rubric, and how the School would communicate its decision to require testing after several years of a test-optional policy.

Fortunately, the decision was met with very little resistance from the community. Throughout the transition this year, the Greenhills team has been deliberate in their communication with families about framing the testing requirement in the broader context of Greenhills School's holistic approach to file review.

DR. KEITH WRIGHT

Dr. Wright is the Vice President of Psychometrics & Assessments at EMA. He has an extensive background in statistical research and academic administration and technical expertise in computer science. At EMA, he is responsible for overseeing the design and operation of assessment scoring, quality assurance, trend analysis, and research related to the measurement of cognitive and non-cognitive domains.

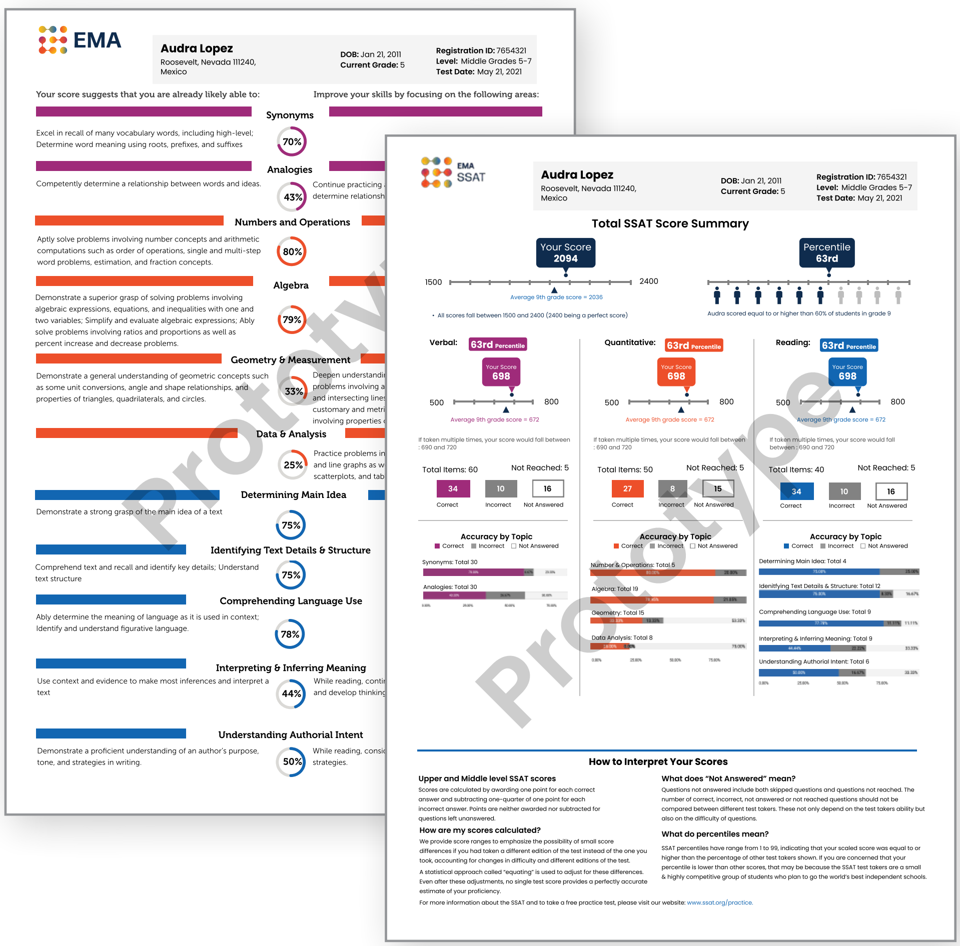
EMA'S Post-Pandemic Response: A More Robust "Diagnostic" SSAT Score Report

Regarding the use of standardized admission assessments, Dr. Keith Wright, EMA's Chief Psychometrician, feels strongly that it's incumbent on the makers of standardized assessments to do a better job educating end-users on how to interpret and use standardized test scores. "I've never been a fan of cut scores", Wright says, "I think that's how we got to where we are– for too long test scores were used inappropriately in the admission process, and there was an overuse of test scores. That is the fault of the testing industry."

Dr. Wright has always been a champion for using test scores beyond determining "accept" and "reject" decisions. There is a deeper meaning to standardized scores that can help reveal a student's academic strengths and weaknesses which in turn offers opportunities for schools to better know and support new students. Given this, it was important for EMA, post-COVID, to determine how to provide enhanced data and insights to accompany SSAT scores to better support students and admission officers.

"There is a deeper meaning to standardized scores that can help reveal a student's academic strengths and weaknesses which in turn offers opportunities for schools to better know and support new students."

The SSAT team is updating its score reporting this fall and will include more information to identify the skills being assessed for diagnostic purposes relative to academic strengths and weaknesses. For both the quantitative and the reading sections, EMA identified five skill areas for deeper reporting. For the quantitative section, the more specific areas that will be reported on include Numbers and Operations, Algebra, Geometry and Measurement, Data Analysis, and Reasoning. For the reading section, the more specific areas will be Determining Main Idea, Identifying Text Details and Structure, Comprehending Language Use, Interpreting and Inferring Meaning, and Understanding Authorial Intent. Based on a student's performance on the SSAT, there will be information included for each tester about the student's strengths and weaknesses in these specific areas. This updated information is expected to be released by late fall 2024, helping admission file readers to know about a student's skills more deeply if there is a need to better understand the academic readiness of a candidate.



The updated SSAT score reporting which will be released later this fall, will help admission file readers gain even more knowledge about the candidate's skills and academic readiness.

A 2023 EMA Special Report authored by Dr. Wright and Dr. Jin Koo, showed that "the Coronavirus Disease 2019 (COVID-19) pandemic has disrupted students' academic progress and mental health across the country." After several years of pandemic learning loss, it's more important than ever to properly assess and support students and their families. Dr. Wright hopes that a more robust SSAT score report will provide additional context to better understand each student's test scores, helping schools better interpret those scores in a more holistic way, for admissions purposes and to ensure a student is ready for the work ahead at their new school.

While each school must weigh the value of standardized test scores in their processes based on their mission, academic program, and enrollment goals, in many cases the inclusion of standardized scores can be valuable. As the Dartmouth decision to "return to testing," showed, the presence of properly contextualized test scores can help a school admit a more diverse class of students. The Greenhills School's decision to return to a standardized testing requirement has allowed their team to conduct a more holistic review without teacher recommendations. A possible silver lining to the pandemic will be new and enhanced resources from standardized testing organizations, like the enhanced SSAT score report, to better support admissions officers in the fair and appropriate use of test scores.

For prospective families to trust our processes and institutions, we must work to ensure consistency, objectivity, and transparency in our admission processes. While there are many paths to that end, standardized test scores when used properly, can help support those goals.

> **"…the decision to "return to testing" is not one-size-fits-all, these shifts in higher education highlight important themes that can be helpful to independent school enrollment managers wrestling with…how to build a fair and objective admission process in a post-pandemic world."**

Tuition, Trends, and Transparencies

From left, Mark J. Mitchell, Jeff Shields, and Anand Mahadevan

School admission teams have an obligation to the families applying to their schools to effectively and efficiently communicate the cost to attend. For most schools, tuition and fees increase each year as limited financial assistance resources persist. To learn more about how schools can improve their policies, we posed three questions to three professionals in the field: Jeff Shields, FASAE, CAE, president and CEO of NBOA; Mark J. Mitchell, vice president of access and affordability with the National Association of Independent Schools; and Anand Mahadevan, EdD, executive director of Canadian Accredited Independent Schools.

Have you seen any trends in how schools are communicating costs to families beyond tuition, e.g., books, transportation, and cocurricular fees? And how can aid play a factor in helping offset these costs to families who otherwise could not afford to send their students to an independent school?

Jeff Shields: My observations continue to be that schools either roll all these costs into tuition or keep them separate in an effort, most likely, to not inflate their base tuition. However, these fees are increasingly significant to many families and are a critical factor as to whether a student can fully participate in the school or not due to financial limitations. Many schools continue to offer financial aid to support these additional fees at the same level they have provided for financial aid. For example, if a student has received 20% of base tuition in financial aid, the school offers 20% of support for the additional fees. I think it is in everyone's best interest—schools and prospective students and families—to be as transparent as possible about these fees as early in the enrollment process as possible.

Mark J. Mitchell: One of the pain points we hear from families considering schools is the unpredictability of knowing the true costs of a school and how those might change. To help address that anxiety, including details on what families might expect to incur in a typical year, would go a long way, such as on an FAQ section on the tuition page or in presentations and webinars on affordability. Disclosing or estimating these costs for families, though, is just one part of the solution. Schools should also be clear about whether financial aid is available to support these costs for families who can't fully afford them. Families who receive financial aid to help cover tuition will also need support for extra costs as well. Beyond that, it's not unusual for some full-pay families to struggle through a school year without financial aid, because they thought they only had to come up with, say, $25,000 in tuition, not closer to $30,000 or $35,000 all in. Schools should have processes and policies in place to be able to support these families as well.

Anand Mahadevan: Canadian independent schools tend to be upfront about the all-in costs of enrollment. More and more, schools are adopting tuition fees that are inclusive of most major incidental costs and, where it's not possible, making the cost to attend much more transparent. This all-in approach is also represented around the financial aid table. When discussing need-based awards, schools tend to calculate need against an all-inclusive cost of attendance, and most schools use a third-party firm to determine eligibility for financial aid. While the percentage of students receiving financial aid has remained stable since 2019, average financial aid packages have increased by 12% over the last four years to support families.

What responsibilities do admission teams have in communicating financial aid/merit awards available to families during the enrollment process and what can they do better?

JS: I believe there is a huge opportunity for schools to better inform prospective students regarding the financial aid resources available to them. I recently engaged with a school that projects financial aid awards as early in the enrollment process as possible, so families know what they can expect with regard to their financial commitment to the school. Other schools provide a financial aid calculator on their websites so families can estimate the type of award they will receive. In all cases, schools should be as transparent as possible with the financial aid resources available to their families, keeping in mind the resources they have available and the net tuition revenue their budget requires to operate the school effectively in any given year.

MM: In the prospect/recruitment phase, schools can be better at helping families gain greater insight into how much of the sticker price shown on the school's tuition webpage they might be asked to pay. Offering dedicated sessions on financial aid and affordability at open houses, visit days or tours, financial aid nights on campus, or virtually are among the common ways to provide this kind of education and guidance. Brief videos on the tuition and aid webpage can also be efficient and effective ways to introduce families to the hows and whys behind a school's financial aid program. Less common but growing in popularity among schools is providing a calculator or estimator tool that allows families to enter information about their family and see what they might be asked to contribute, based on the school's record of supporting families of similar characteristics over the past year or two. In the awarding phase, schools must endeavor to provide the financial aid decision at the same time as the enrollment or re-enrollment offer. With more and more families reporting that price and affordability are critical factors in their decisions to apply and enroll in our schools, the school that is less than upfront and forthcoming with financial aid information will do itself an increasing disservice.

AM: It is strategically important to the school's reputation to be transparent both about fees and how financial aid dollars are calculated and allocated. Families also need to be upfront and honest about their needs. To avoid the appearance of bias, many schools use a third-party financial company to determine the needs of families and use this process to determine the level of support. From a Canadian perspective, independent schools are very proud of their facility to provide needs- and merit-based awards and actively promote them to prospective families. It's something that takes thoughtful consideration, however, as some prospective families still feel a sense of stigma around financial assistance, which can create a barrier to a transparent enrollment process.

Are newly launched programs in tuition discounting/resets opening the door for more schools to rethink their annual tuition increases?

JS: A tuition reset is a very specific strategy for an independent school to undertake and depends on its perceived value and competition within its marketplace. A tuition reset can signal the school is accessible, garner positive public relations and media attention, and fill more seats in key divisions. Research is critical to understanding the market and different scenarios. Successful resets result from strong teamwork across school leadership, from the business office and marketing to the board and head. Any reset must consider the long-term financial health of the school. In a recent Net Assets magazine article, "Returns on a Reset" (Nov/Dec 2023), the tuition reset results from three well-established schools were profiled and, overall, each has thus far found success in their campaigns to lower tuition and grow revenue, and sooner than expected. Each school did so in its own way, after extensive research, with close attention to its positioning in its marketplace.

MM: Tuition resets is still quite uncommon within independent schools. I tend to see schools rethink their annual tuition increases as a reaction to changing dynamics in their demand and enrollment realities. In other words, they are less likely to revisit tuition increases because others are doing resets and more likely to revisit tuition approaches if there's evidence or concern that factors such as enrollment (especially at key entry grades), admission applications, and/or yield rates (i.e., the percentage of accepted students that enroll) are decreasing. These trends could indicate that price and price growth (or perception of the value of the price) are weighing more heavily on families in the market, which could drive them to make other choices. Of course, price and tuition pressure aren't the only factors that can lead to lower demand, but if lower demand is happening, a school would be remiss not to explore dynamics of price change or shifting value perception as a strong possibility. Or if schools are seeing increases in aid applications, discount rates (i.e., the amount of gross tuition that is forgone by offering financial aid and other discounts), and/ or attrition, it's not unreasonable to explore if price or price growth is a factor at play. Especially if the growth is seen among current and/ or higher-income families, these can be indicators that more families are seeking help with price offsets and that keeping up with tuition increases is getting harder for them.

AM: Schools are facing rising operating costs as a result of programmatic enhancements, new infrastructure demands, and an overall increased cost of goods and services in an inflationary environment. In addition, families are savvier and ask schools to demonstrate a strong value proposition to help make their decision. However, there continues to be high interest and competition for spots in excellent independent schools and thus less pressure on discounting programs. That said, many schools did lean into new strategies of financial support to retain current families in the pandemic, and those lessons are part of the strategic set of tools that schools can dip into as inflationary pressures rise. A strong culture of philanthropy and building endowments can be helpful to schools as a way to mitigate some of the challenges posed by tuition increases.

From Enrollment Leader to Head of School: Unique Journeys and Common Threads

BY ANN CLIFFORD

The journey to becoming a Head of School is a tapestry of unique experiences and career decisions woven together over time. Some follow a relatively straightforward path, progressing from point A to point B. Others take a route filled with twists and turns. To understand the different career paths, EMA invited five successful Heads of Schools with enrollment management backgrounds to share their stories and what they have learned along the way. The following profiles highlight that while there's no step-by-step map from Director of Enrollment to Head of School, there are common threads that guide the journey.

Tom Sheppard

HEAD OF SCHOOL AT UNIVERSITY LIGGETT SCHOOL IN GROSSE POINTE, MICHIGAN

Take the risks – and find the joy.

As the son of two educators, Tom Sheppard grew up on the campuses of independent schools and had a front-row seat as his father's career path led to becoming a Head of School. When it came time for Sheppard to join the workforce, he chose teaching because of the challenges, rewards, and fun it offered. He began his career teaching history, coaching, and advising at the Perkiomen School in Pennsburg, Pennsylvania.

"I'm glad I started off as a teacher," Sheppard says. "It gave me a profound appreciation for how hard it is. As any teacher will attest, the first two years are the greatest challenge a person can have."

After five years in teaching, Sheppard transitioned into a progression of admissions and enrollment roles that allowed him to make a difference for a whole school. "Over the years, I began taking on more and more complex roles, moving from pure admission into true enrollment management," he explains. "These roles took me to bigger schools with different competitive profiles."

Along the way, Sheppard gained an appreciation for the way his enrollment skills and experiences – data, personal connection, and strategy – fit together. In 2018, he accepted his first Head of School role at St. Andrew's Episcopal School in Ridgeland, Mississippi. The move came at a time when the business aspect of school leadership was gaining more importance.

"At the time, a few enrollment leaders had blazed the trail by moving into Head roles, but it wasn't a common path," Sheppard says. "Now, schools are realizing that enrollment and admission professionals understand the business and strategic sides of school leadership and are also well-versed in the academics because they talk about it all the time with prospective students and families."

The best preparation for a headship is getting involved in as many aspects of school life as possible, according to Sheppard. "Don't be shy about seeking opportunities to lead," he advises. "Show through your work that you're creative and innovative. In our ever more challenging business environment, the folks with a strong grasp of school operations will rise to the top."

Having diverse experiences gives you the tools you need to navigate the process of becoming a Head of School and the job itself. "Don't be afraid to take the risks," Sheppard says. "You have to be willing to move anywhere to find the right role – and you have to accept there will be tough days. When you do, you ensure that the moments of joy and celebration, of which there will be many, outweigh the tough times."

Dr. Jasmine B. Harris

HEAD OF SCHOOL AT TMI EPISCOPAL IN SAN ANTONIO, TEXAS

Find your fit.

When Dr. Jasmine Harris got a job in an after-school program, her career journey shifted. She changed course from pursuing a law degree to education. And she hasn't looked back.

She started as a second-grade teacher in the Dallas public school system. From there, she earned a master's degree in second language acquisition and ended up writing the curriculum for a program to help third graders learning English as a second language transition into mainstream classrooms. Based on that work, Harris was encouraged to explore an administrative role. She became an assistant principal at a high school with 2,200 students.

During that time, she began work on her doctorate. As part of the program, she met monthly with a group of fellow students – six from public schools and two from independent schools.

"We would go around the room and talk about what was on our mind," she says. "Those of us in public schools had a similar story – concerns about truancy, testing, and lack of parental involvement. The two from independent schools talked about keeping alumni more engaged, increasing their annual funds, and creating an endowment."

Dr. Harris was intrigued by the different environments. "As I sat at the table every month and listened, all I could think of is, they're creating," she says. "My role felt more reactionary."

A member of her cohort put her in touch with someone at The Hockaday School in Dallas. In 2005, she joined the school as Director of Faculty Recruitment and Community Relations. The position was created for her outside of the school's infrastructure. As a result, she got to work on a variety of projects across HR, communications, parent education, and admissions. Admissions stood out as the area she enjoyed most.

"I saw admission not as being a gatekeeper," she says. "If you do it right, you get to be a gate-opener for people who may not have considered independent schools. That was exciting to me."

"When I moved to independent schools, many of my friends who worked in the public school system said, 'How can you abandon the children who look like you?'" Harris notes. "But one of the things I learned while working at Hockaday was the people making decisions that impact people who look like me send their children to independent schools. I wanted to be in the room to empower the students and community to understand the capacity of people who don't look like them and who may not live where they live."

Her next role was the Director of Admission and Enrollment Management at The Lamplighter School in Dallas. The job included admission and placement among a

consortium of 16 schools. "The role gave me a larger landscape to think about other ways admission could be done, how visits could be held, and what the process could look like," she says. "I couldn't have asked for a better place to learn."

"Being an admission director ignited such a flame in me," Harris continues. "I decided to pursue a headship because I was determined to open the gate for others."

After going through the NAIS Aspiring Heads program, Harris took the first opportunity. "I was so excited about being a Head of School and making all the changes I had imagined," she explains. "What I learned from the experience was the importance of fit."

Going in, Harris knew the role would be difficult. However, navigating the pandemic as a new Head of School made it even more challenging. "When you don't know the community, and you don't look like the people you're leading, it's hard. I learned how important it is to be the right fit with the culture—and to have goodwill among the community."

She advises aspiring heads to pause and think about fit when considering opportunities. Now Head of School at TMI Episcopal in San Antonio, Texas, Harris has found a good fit where she's able to create a school environment with a deep sense of community, where all are known and welcomed.

Henry Fairfax

HEAD OF SCHOOL AT CONCORD ACADEMY IN CONCORD, MASSACHUSETTS

> **Each experience leads you to the next.**

Henry Fairfax describes his introduction to independent schools as a life-altering experience. Transferring to The Haverford School for Boys to attend high school ended up being the start of his career journey. After attending Drexel University (and playing Division 1 basketball), he reached out to independent school contacts to explore a career in education.

"My first offer was from The Haverford School, but I got some great advice to start at another school and get a different perspective," Fairfax says. "I started my career at McDonogh School in Maryland. McDonogh's mission of doing the greatest amount of possible good really sang to me. And I did everything I could – full-time middle school sub, adjunct dorm parent, track and basketball coach."

One of Fairfax's first leadership responsibilities at McDonogh was running the school's Foundations program for first-generation independent school students. "A strand of the program was about attracting, yielding, and retaining students," he explains. "Going out and engaging with feeder schools and talking with students and families about how independent schools changed my life was my first introduction to admission and enrollment. I loved it."

After five years at McDonogh, Fairfax returned to The Haverford School to become Associate Director of Admissions and, later, Director of Admissions. During this time, he had the opportunity to consult on admissions for Girard College, a full-scholarship boarding school for underrepresented youth that he had

always been curious about.

"The place was a mystery to me. I grew up in Philly, and there's a huge wall around the school. Few people have been inside the wall, so when I had the chance, I took it," he says. "I fell in love with the mission and everything the school is about. One thing led to another, and they carved out a role for me as Vice President for Institutional Advancement and Enrollment Management."

A successful partnership with A Better Chance led to an article in The Philadelphia Inquirer, which caught the eye of a local group looking to start a new school. After getting to know the program, Fairfax was asked to become the founding Head of School at the Revolution School in 2018.

"I thought, when else will I have a chance to be a part of starting a school?" Fairfax says. "I took the chance. When I look at my career journey, it's a squiggly line. But being able to be in different spaces and have complex experiences has informed how I lead and how I show up."

In 2022, Fairfax took the next step in his journey, becoming Head of School at Concord Academy. Again, a past experience led Fairfax to the role. During his time at McDonogh, he had worked with a retired Concord Academy Head of School, Tom Wilcox, at the Baltimore Community Foundation. Wilcox reached out and asked Fairfax to consider coming to Concord.

"I knew Concord Academy's reputation," he says. "The more I read about it, the more I became intrigued. There was so much synergy, I had to take a look."

Today, Fairfax brings his experiences in admissions and enrollment to his current role. "I wish more people would think about making the move from enrollment to Head of School," he says. "My admission experiences working with the boards, making data-driven decisions, and figuring out value propositions prepared me for the work I do now."

Ashley Rae Mathis

HEAD OF SCHOOL AT NOTRE DAME HIGH SCHOOL IN SAN JOSE, CALIFORNIA

> **Own who you are—representation matters.**

Ashley Rae Mathis is completing her first year as Head of School. While this specific leadership role is one she

didn't always aspire to attaining, her journey revealed that it was the ideal merger of her passions, skills and expertise.

"I am driven by impact. I enjoy dreaming wildly, analyzing data, witnessing growth and building community. What I realized unexpectedly at some point, was that this was my dream. It was the role that allowed me to meld all the pieces together." Mathis' career began as a kindergarten teacher. As she moved across grade levels she remained inspired and she ultimately returned to school to earn a graduate degree. She loved her graduate work in the Annenberg School at the University of Southern California; she simultaneously learned to love admissions.

"Globally, USC has one of the most intricate, comprehensive college admission processes," she says. "I learned such great practices–best practices–in recruitment, enrollment and retention. At USC, I truly honed in on the importance of fit and mission alignment."

A lifelong learner, after graduation Mathis was invited to work at Bain & Company–Bain Los Angeles, then Bain South Africa. "I wanted to understand what businesses were doing tactically that schools were not yet doing, so those best practices could be applied to progressing our schools. That experience was eye-opening for me."

With faith at the forefront, next Mathis secured roles that allowed her to expand her toolkit and widen her educational lens. She served as the Director of Admission at Milken Community School in Los Angeles, then she became the Director of Enrollment Management at Ursuline Academy of Dallas. "When I moved into the private school sector as an administrator, I was able to create curriculum and build meaningful co-curricular programming. I was pouring into students, faculty and program." Mathis says. "The distinguishing beauty about independent schools is that they are mission-driven. As a highly reflective learner and a results-driven admissions practitioner, headship felt like a natural progression."

Mathis is certain the career path from enrollment manager to Head of School is not solely pragmatic, it also doesn't get talked about enough. "The tools, growth mindset, and scope you inherit in the enrollment management field are invaluable," she affirms. "Working with data understanding tuition revenue, and collaborating with boards enables you to learn how to think and operate a school holistically."

For Mathis, applying to the NAIS Aspiring Heads Program proved to be advantageous. At the time, she was convinced the program would prepare her for a headship she would pursue at least 10 years down the road. Instead, she exited the program with a keen sense of urgency and passion to forge forward with intention. "A record number of heads were leaving education mid-COVID and the world was fragmented with heartbreaking injustices. It was clear that the time to create change was now," Mathis recalls.

Though her journey was unique, Mathis offers three pieces of advice to enrollment leaders seeking to make greater impact. First, she recommends being well-read and researched about educational trends, stewardship and relationship building. Second, she advises colleagues to learn from leaders they admire and from leaders who think and move disparately. Finally, and most importantly, she encourages colleagues to own who you are as a leader, because representation matters.

"Refrain from getting wrapped up in the expectations of those around you. Remember, there is something to knowing and trusting who you are. For me, I strive to be faith filled and exude servant leadership. As a result, I'm consciously mindful of my presence my identity, my place in education. I choose—understanding that it is indeed a choice—to lean into that. Every day, every decision, every conversation, I bring my identity as a Christian, African-American, woman leader. And, I am unapologetically, joyfully proud of that."

Sally Keidel

HEAD OF SCHOOL AT THE AGNES IRWIN SCHOOL IN ROSEMONT, PENNSYLVANIA

When people tell you that you're ready, listen.

Sally Keidel has a deep appreciation for the unique perspective enrollment leaders have – and how the experience can seamlessly translate into becoming a Head of School. That's why she believes more enrollment and admissions directors should follow the path.

"Developing the different components of strategic enrollment prepares you so beautifully to be a head of school," Keidel says. "You're thinking about the school as a business and the different ways the school can move the needle. That ability to think big picture – and also handle the day-to-day nuts and bolts – is what you need to be a successful enrollment manager. And it carries through into the Head of School role."

After two years as a teacher, Keidel moved into the Assistant Director of Admission role at Chatham Hall in Chatham, Virginia. In the years that followed, she worked in enrollment at four schools. Her first Head of School role was at Montgomery School in Chester Springs, Pennsylvania. Then, in 2020, she became Head of School at The Agnes Irwin School, where she had previously served as Director of Admission and Assistant Head of School for Enrollment and External Relations.

Along the way, as Keidel's career progressed, so did the definition and scope of school enrollment. "During my journey working in enrollment, I experienced the coming of age of strategic enrollment management," she explains. "Being part of a school that fully embraced the concept of enrollment management as much more than admission prepared me for a Head of School role."

Keidel can pinpoint the catalyst that prompted her to consider pursuing a headship. "As an enrollment leader, you're talking to the external marketplace through the admission families coming in," she says. "You're working a lot on retention. You've earned the respect to be at the table during leadership team meetings, board meetings, and finance committee meetings. You get to a place where you can see what needs to happen next with the school, but you're not in a position to influence the changes. I realized I wanted to shift my seat to have more impact."

Still, Keidel points out you may never feel completely ready for a Head of School job. "Sometimes people, women especially, can hold themselves back by thinking they're not ready yet," she says. "That's when you need to listen to what the people around you are saying and how they're encouraging you. When they're telling you that you're ready, it's time to be brave and go do it."

Keidel says being a Head of School is challenging – and rewarding. "When you think about the role of admission director, you have a lot of influence on the trajectory of a school through the students you're able to attract, enroll, and retain," she explains. "As a Head, you're in a seat where you see the organization completely and the pieces that need to come together. You're able to draw on your experiences and expertise to create a vision, get people behind it, and lead an organization that's working together to advance the school."

Accept access.

“The Student Prospect List is an excellent investment because it focuses on families already interested in independent schools rather than random Google leads. This targeted approach delivers successful enrollments for us.”

-Katherine Giszack, Director of Admission, Oak Hill Academy (VA)

A Whole New Challenge: Aimee Gruber Reflects on the Launch of TASIS Portugal

Aimee Gruber has spent the past three decades honing her skills in admission and related fields, first as a director of admission and financial aid at boarding and day schools in the United States, and then working for nonprofit educational associations including EMA and The Association of Boarding Schools (TABS). In 2019, Aimee embarked on her latest enrollment adventure: helping launch TASIS Portugal.

Over the past few years, the EMA team has checked in with Aimee to learn more about her role as Assistant Head, Enrollment Management and Marketing, and to hear about the successes and challenges of this unique project.

(This interview took place over several conversations and has been edited for clarity and flow)

Can you give us some background on TASIS and TASIS Portugal?

Aimee Gruber: : In the fall of 1956, the inimitable M. Crist Fleming founded The American School in Switzerland (TASIS) as an experiment in international education. Today TASIS is a respected family of international schools with three campuses in Europe and one in Puerto Rico. Following the death of M. Crist Fleming in 2009, the TASIS Foundation Board of Directors long discussed the need to honor Mrs. Fleming's legacy by launching a fourth TASIS school. Portugal "checked all the boxes" for the next TASIS location: a beautiful, culturally rich location with an appetite for international education.

Eventually, the Foundation Board purchased a shopping center in Sintra, Portugal, with the creative vision of transforming it into a thriving international school. Fast-forward to the spring of 2019, my husband, Keith Chicquen, Founding Headmaster of TASIS Portugal, and I were hired to launch the school. We arrived in Portugal on August 21, 2019, and got right to work as the school was scheduled to open in September 2020. We knew we were working with a tight window for opening the school– and that was before we could imagine the challenges the pandemic would bring.

What were some of the biggest challenges you faced early on in this project?

AG: Since we were new to the country, we had no idea about the challenges inherent to construction in Portugal. Now that we know, we aren't sure why anyone believed we would be open on time! Construction delays and the heavy bureaucracy involved with permits make it challenging to get things done quickly. It should come as no surprise that the campus was not ready for opening in September 2020.

Pandemic-related travel restrictions and the canceling of large-scale events opened the door for us to work with the Penha Longa, a Ritz Carlton property close to TASIS Portugal, to temporarily house our school. TASIS Portugal opened in a 14th Century Monastery on the property of the Ritz and what an idyllic location! Approximately one month later, the initial phase of construction was complete and we were able to move into our permanent school home.

Can you tell us a little about the TASIS Portugal marketing strategy and how marketing has changed over the past four years?

AG: Without the luxury of time, we knew an effective marketing strategy would be essential to our success. To guide our initial efforts, we developed the original TASIS Portugal Marketing Plan that focused on five key areas: 1. leverage the respected TASIS brand and history, 2. introduce the curriculum and explain its tenets, 3. make the Headmaster accessible (unheard-of locally!), 4. introduce teachers and give the academic leadership team a voice, and 5. engage interested families and maintain a connection to enrolled families.

We built our admissions infrastructure and marketing collateral with a focus on fidelity to the TASIS brand. That meant working with a designer to transform the former mall security office into an elegant admission suite called the "Welcome Center" that contains reception, admissions, marketing, and communications. In the early days, we had to get creative with our marketing collateral by using images of other TASIS schools to help families clearly imagine the beauty of the future TASIS Portugal.

AIMEE GRUBER

Aimee has spent the past three decades working in admission and related fields, first as a director of admission and financial aid at boarding and day schools in the United States, and then working for nonprofit educational associations: the Enrollment Management Association (EMA) and The Association of Boarding Schools (TABS). Aimee holds an undergraduate degree in Communications and Anthropology (double major) from The University of New Hampshire and a master's degree in education from Plymouth State University. She served two terms on the board of the Independent Educational Consultants Association (IECA) Foundation and is a recipient of two industry awards: the Western Boarding Schools Association's Hilton Award for outstanding contributions to the association and the Small Boarding School Association's Gorman Award conferred upon a member who has made an outstanding contribution for the benefit and advancement of small boarding schools.

The TASIS Portugal website launched in November 2019 and became a vital hub for engaging families by sharing videos and providing insights about the curriculum. The website is an essential marketing tool, and any print or social media content always directs families back to the website. Different from many of our competitors, we list the bios of all our staff and faculty on our website. This is particularly important since we now know our international experienced faculty are one of the main reasons families choose TASIS Portugal.

Even before the pandemic, Portugal was an appealing country for expatriates and was incentivizing foreigners to relocate via government programs like the Golden Visa Program, the D7 Visa Program, and the Non-Habitual Resident (NHR) tax program. As a result of the influx of international families, Portugal has seen dramatic growth in the international school sector with for-profit groups buying existing schools and building more. Boutique forest schools and alternative schools are also disrupting the marketplace.

In one of my first TASIS Portugal Board Reports, I described the competitive landscape as one where the leading schools didn't have to do much in terms of marketing. But given the growth in the international school sector, marketing has changed and more changes might be coming.

Recent news suggests that some of the government visa and tax incentive programs may be ending. Will we see another sudden dramatic shift? So far, application and visit numbers are comparable to previous years, but I'll absolutely be keeping my eye on this. As EMA has long communicated, enrollment and marketing leaders (and schools!) have to respond to myriad factors outside of their control and changing government regulations is certainly an important one.

Tell us a little more about TASIS Portugal's strategies for engaging families and building community, both through the pandemic and beyond.

AG: By February 2020, the word about TASIS Portugal was beginning to spread. Then came the lockdowns, and, like the rest of the world, we were forced to get creative.

We knew we had to focus on keeping enrolled and prospective families engaged and confident that the school would open as planned. To address that uncertainty, it was common to have four to five Zoom meetings with a family to discuss every detail of the school and the family's unique situation.

We launched a weekly e-newsletter that provided interesting updates about developments at TASIS Portugal. The weekly newsletter continues today with high open-rates – consistently between 75 and 80%. Our Headmaster, Keith Chicquen, always writes the intro and doesn't shy away from addressing "issues."

TASIS BY THE NUMBERS

Since opening its doors in 2020, TASIS has seen remarkable growth in student enrollment. Here is a yearly breakdown of student enrollment:

- Year 1 (2020-21): 245 Students
- Year 2 (2021-22): 495 Students
- Year 3 (2022-23): 675 Students
- Year 4 (2023-24): 795 Students
- Year 5 (2024-25): 890 Students (projected)

TASIS is projected to reach its full enrollment capacity of 1,000 students by Year 7.

Parents regularly comment on how much they appreciate Keith's candor and authenticity.

In addition to our website, we have built a Parent Community Portal (supported by Toucan Tech) that features everything from news stories, parent education resources, and information about upcoming events for parents.

M. CRIST FLEMING

M. Crist Fleming, the pioneering founder of The American School in Switzerland, TASIS.

What comes to mind when you reflect on the challenges and successes of the past four years?

AG: The value of being part of a family of schools cannot be oversold. The entire admissions, marketing, and communications team at TASIS helped us launch TASIS Portugal. We have benefitted from the expertise and leadership of the TASIS Foundation, the remarkable members of the TASIS Portugal Board of Trustees, including Fernando Gonzaléz, Chairman of the Board, and our own exceptional admission and marketing team.

I think it's safe to say that my prior experiences with boarding and day schools, TABS, and EMA, all prepared me for a completely new challenge. I'm excited to continue to build and leverage year-over-year enrollment.

Through the challenges, our team has created a strong sense of community in less than four years, both inside and outside of our walls. Enrollment is strong and our students are thriving. The revitalization of the former mall has had a profound positive impact on the surrounding community and has boosted the local real estate market.

M. Crist Fleming undeniably remains a guiding force at all TASIS schools. Her portrait sits outside Keith's office and even our youngest students know her name. Although TASIS Portugal opened 11 years after her death, all who knew her and worked with her believe that she would be incredibly proud of the newest TASIS school.

> **"I think it's safe to say that my prior experiences with boarding and day schools, TABS, and EMA, all prepared me for a completely new challenge. I'm excited to continue to build and leverage year-over-year enrollment."**

"One of the things we love most about this project has been the challenge of transforming a defunct shopping mall into a thriving international school. TASIS Portugal features purpose-built education spaces, dedicated green spaces, and benefits from a pre-existing parking garage with 400+ spaces."

Reach New Heights: Gather with colleagues at EMA's 67th Annual Conference in Boston

BY MARK COPESTAKE, Senior Director of Professional Development, Enrollment Management Association

We look forward to welcoming you and over 1,200 colleagues from around the country (and around the world) in Boston, Massachusetts, for illuminating conversation and an empowering community experience at EMA's 67th Annual Conference this September. This year's conference theme "Elevating Enrollment" offers conference-goers the opportunity to continue to grow leadership and management skills, learn from one another and from incredible speakers, collaborate on industry-wide innovations, and celebrate accomplishments while planning for future strategic growth. In addition to the general conference (September 18-20), EMA is delighted to offer its flagship pre-conference workshops (September 17-18): Admission Training Institute (for professionals new to the enrollment management field), Admission Directors Institute (for new admission directors), and Future Leaders Institute (for aspiring leaders with at least three years of experience). Additionally, a wide range of post-conference workshops will be held on September 21.

This year's conference will be held at the Sheraton Boston Hotel which is nestled in the historic Back Bay neighborhood and directly connected to the Prudential Center. Guests will have the option to stay at the Sheraton or the adjoining Marriott Hotel. Both hotels are in the heart of downtown Boston should you wish to experience a game at Boston's iconic Fenway Park or stroll along Newbury Street with your colleagues and teammates to discover amazing dining options. This year we are pleased to introduce the EMA Lounge, a designated space for you to socialize with colleagues and EMA staff. There will be more concurrent sessions on offer as well as customized opportunities to network with colleagues in similar roles.

The keynote speakers are second to none and include widely acclaimed public interest lawyer Bryan Stevenson, the founder and Executive Director of the Equal Justice Initiative (eji.org), a human rights organization in Montgomery, Alabama, and author of the bestselling book *Just Mercy* that was adapted into a feature film. Under Mr. Stevenson's leadership, EJI has won major legal challenges eliminating excessive and unfair sentencing, exonerating innocent death row prisoners, confronting abuse of the incarcerated and the mentally ill, and aiding children prosecuted as adults. Be sure to read *Just Mercy*, watch the movie adaptation starring Michael B. Jordan as Bryan Stevenson, or check out the HBO documentary *True Justice* before traveling to Boston this fall.

We are also pleased to welcome well-known higher education thought leader and the seventh President of Northeastern University, Joseph E. Aoun. An internationally respected voice on higher education, President

Aoun has led the global expansion of Northeastern's signature co-op program, bringing experiential learning opportunities to more than 140 countries. During his tenure, the University has created a global university system spanning 13 campuses across North America and the U.K., quadrupled external research funding, and hired more than 800 tenured and tenure-track faculty. He is the author of numerous articles and books, including *Robot-Proof: Higher Education in the Age of Artificial Intelligence*. We strongly encourage you to check out President Aoun's book before hearing him in Boston where he will speak about how educational institutions should embrace the challenges and opportunities associated with the transformative effects of artificial intelligence.

Furthermore, EMA is thrilled to welcome Joy St. John, Director of Admissions at Harvard College, as the closing keynote address. Before Harvard, Joy served as Dean of Admission and Financial Aid at Wellesley College for seven years. Early in her career, she held admission roles at Amherst College, Tufts University and Occidental College and worked briefly as a College Counselor and Director of Scholarships at The Bishop's School in La Jolla, CA. She has spent twenty-five years dedicated to issues of access and diversity in college admission and higher education. Joy will discuss trends and share her observations around enrollment management in higher education, including the impact of the COVID-19 pandemic on higher education, the evolving landscape of access and equity in applying to college, and supporting the next generation of enrollment leaders.

Finally, we will celebrate EMA's Executive Director and CEO, Heather Hoerle, at her final Annual Conference before her retirement in recognition of all she has done to elevate the independent school enrollment management industry. We encourage Heads of School, CFOs, and Marketing/Communications colleagues to join their enrollment teammates at this year's conference.

BOSTON BOUND

What to do in your downtime while at this year's conference.

- Grab tickets to see a Boston Red Sox game at Fenway Park. The Red Sox will be up against the Minnesota Twins each night, Friday through Sunday.
- Order a bowl of New England clam chowder (or "chowdah" as the locals say) from Atlantic Fish Co.
- Take a stroll or a jog through the Charles River Esplanade and soak in the city skyline views.
- Get your caffeine fix and pick up a coffee at Thinking Cup or Jaho Coffee Roaster

Register today at ac.enrollment.org! Early bird pricing ends July 12, 2024.

MARK COPESTAKE

Mark joins EMA from the Latin School of Chicago (IL) where he served as the Director of Enrollment Management and Financial Aid. In this role, Mark oversaw all matters on enrollment, recruitment, retention, and need-based financial aid. Prior to Latin, Mark served as the Assistant Dean of Admission and the Assistant Dean of Pluralism and Multicultural Affairs at Lake Forest Academy (IL). Originally from England, Mark moved to the U.S. in 2015. He previously worked in admissions and strategic leadership roles at the University of Cambridge, University College London, and the Social Mobility Foundation. Mark is a graduate of the University of Cambridge and completed the University of Southern California's Leadership in Enrollment Management certificate program in 2017. Mark has been a member of EMA's Admission Leadership Council since 2018. In this capacity, he has sat on numerous working groups, served as a member of the annual conference selection committee, and co-chaired EMA's LGBTQIA+ affinity group.

New Name, Same Mission: Meet the EMLC

BY KATELYN FORERO

From Spring Seminars to Annual Conference sessions, the Admissions Leadership Council (ALC) has been a mainstay in the EMA community for over 10 years, providing important professional development resources and programming to all EMA members. While this dedicated team hasn't gone anywhere, they're now known by a different name. With a freshly minted moniker and exciting programming on the horizon, we'd like to reintroduce you to the ***Enrollment Management Leadership Council (EMLC)***.

Why the change?

In summer 2023, the council made the decision to change their name from Admissions Leadership Council to Enrollment Management Leadership Council to better reflect the scope of their work. "After the release of the EMA's Enrollment Spectrum, the co-chairs felt it was time to realign the leadership council's name, as we do not simply focus on admissions. EMLC aims to be thought leaders in the profession and as such looks to all aspects of enrollment management. We use the Enrollment Spectrum to help frame [our] work," says EMLC Co-Chair, Kimberly Carter, Executive Director Enrolment Management at Branksome Hall (ON, Canada).

Who are the EMLC?

The EMLC is an experienced team of enrollment professionals composed of four co-chairs and 16 EMLC volunteer faculty members from across the U.S. and Canada. The four primary roles of EMLC are to serve as sounding board for EMA and the development of enrollment services; serve as conveners and facilitators of regional and annual meetings of members; provide professional development programming leadership; and act as advocates for the critical role of enrollment in schools.

What does the EMLC do?

Each EMLC co-chair leads a working group that focuses on one of four areas: Culture & Belonging (DEIB), Mentoring & Leadership, Financial Aid & Tuition, and Recruitment & Engagement. Out of these working groups come important resources for EMA members like mentor/mentee training programs, pre-conferences, Spring Seminars, EMA Annual Conference sessions and Post-Conference sessions, thought leadership articles in *The Yield*, and more. "The EMLC is integral to providing support, training, encouragement, and thought leadership as we encounter paradigm shifts in our nation, cities, and schools," says EMLC co-chair Rob Wise of The Joy School (TX).

EMLC members are passionate about enrollment and community-building and represent a diverse array of schools and admission offices. As such, programming is designed to support the work of admission teams of all sizes and schools of all kinds. EMLC Co-chair Maile Uohara, Director of Enrollment Management and Admission at Punahou School (HI) shared that "one aspect of EMLC that truly resonates with me, and where my passion deeply lies, is in providing resources to individuals new to the industry or those running small admissions offices."

EMLC Co-Chair Rohan Arjun, Director of Enrollment Management and Financial Aid at Friends Select School (PA) adds that "through the annual conference, fairs, and on-the-road interactions (both domestically and internationally), I have had the privilege of being mentored by giants in the field. These experienced professionals have generously taken me under their wings, sharing their knowledge, insights, and best practices. Their guidance has been invaluable in shaping my approach to enrollment management."

Interested in getting involved?

All EMA members are invited to learn more about the volunteer opportunities with EMA, including joining the EMLC. If you're interested in learning more about these exciting opportunities, please contact a member of EMA's Professional Development team.

> **"EMLC aims to be thought leaders in the profession and as such looks to all aspects of enrollment management."**
>
> **EMLC CO-CHAIR,**
> Kimberly Carter

ROHAN ARJUN

Director of Enrollment Management and Financial Aid, Friends Select School (PA)

KIMBERLY CARTER

Executive Director Enrollment Management, Nranksome Hall (ON, Canada)

MAILE UOHARA

Director of Enrollment Management and Admission, Punahou School (HI)

ROB WISE

Director of Enrollment Management, The Joy School (TX)

The Enrollment Management Association's strategic Enrollment Management Spectrum helps define what "enrollment management" means in independent schools. The Spectrum is a roadmap for admission and enrollment leaders and a framework to help other school leaders understand how their work contributes to enrollment.

Accept simple.

"I have been through college admissions with an older child, and the level of stress on my fifth grader was substantially higher than on a high school Junior…"

-Parent, *The Ride to Independent Schools*, 2023-2024

Four Tips for a Better Financial Assistance Model

WITH ERIN WALSH, Director of Communications & Marketing, Whitfield School, St. Louis, Missouri

The process of navigating financial assistance can be daunting and stressful for families. There are deadlines that must be met, paperwork to be completed, and the uncertainty of what the final financial commitment will be. *The Yield* spoke with independent school marketing pro, Erin Walsh, to shed light on ways schools can enhance their financial assistance model and effectively communicate available aid to families during the admission process.

1. Be Transparent

The more information a school can have available to families up front—ideally, on its website—the better. This includes the types of awards the school offers—need-based, merit scholarships, alumni scholarships, character scholarships, etc.—as well as the criteria, deadlines, and cost to attend. Schools should also clearly define the process for maintaining or renewing awards. Are families required to apply annually, or biannually? What are the expectations for a scholarship award? In addition, schools should also consider outlining the renewal and maintenance process in the admission offer.

2. Be Communicative

Share information often and in writing. Post policies and practices on your website and in your handbook. Make sure the current reenrollment timeline, tuition schedule, and financial aid process is shared every year. Work to communicate the steps involved in the financial assistance process to help ensure families meet deadlines. The amount of time it takes to complete the application, coupled with a lack of understanding of how decisions are made, are the two major barriers families encounter in the process. Let families know in advance of hard deadlines and what documents to have prepared to complete the application.

The financial assistance application should coincide with the application for admission for new families as well as for those reenrolling, alongside any other admission guidelines. Ideally, families should not be expected to enroll (or reenroll) without knowing their full financial commitment; scholarships and financial aid decisions should be communicated well before enrollment deadlines.

3. Be Objective

Utilizing a third-party assessment tool such as SSS (School & Student Services) or TADS (Tuition Aids Data Services) is critically important in establishing a baseline for your financial aid committee. Regardless of the tool your school uses to assess eligibility, your committee should begin with an unbiased recommendation.

Families who apply for need-based aid should be prepared to disclose current and accurate financial information from their personal tax filings and business tax filings, as well as information about their family's spending habits such as consumer debt, vacation spending, savings, various memberships, and other monthly expenses. Schools should establish a financial aid committee that includes the financial aid administrator, director of enrollment, head of school, division directors, and the CFO or business office administrator.

Most third-party assessment platforms allow families to view their initial assessment, also called the estimated family contribution. For example, if a school's tuition is $20,000, and the estimated family contribution is $12,000, the family might expect to receive an $8,000 financial aid award. However, schools do not have to adhere to this recommendation; it is merely a guide. Available funds and/or enrollment initiatives may cause a committee to adjust the aid offer accordingly. Again, transparency is key, and schools should utilize the offer letter to communicate its rationale.

4. Be Prompt

Families who are entering the financial aid process for the first time may be anxious to receive an estimate. While challenging to provide an award estimate in the absence of a completed financial aid application, admission counselors can look at income models. For example, NAIS's Market View tool allows you to create a tuition affordability estimate based on household income. This is something we post on Whitfield's website to help prospective families make affordability decisions as they enter the admissions and financial aid process with us.

ERIN WALSH

Erin Walsh is advancement professional with more than 12 years of experience in enrollment management and educational leadership. As the Director of Communications & Marketing at Whitfield School (MO), Erin leads communications, oversees marketing and branding initiatives, and manages social media platforms.

Enrollment Management Association

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- **Shanghai - Agent Speed-Dating Event** (November 18)
- **Ho Chi Minh City Agent Speed-Dating Event and Student & Family Recruitment Fairs**(November 21)
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John A. Williamson, Director of Global Membership & Business Development
jwilliamson@enrollment.org

Global Partnerships: Strategies for Working with Educational Agents

BY JOHN A. WILLIAMSON, Director of Global Membership & Business Development, Enrollment Management Association

For decades, questions and myths about working with educational agents have swirled around the admissions world, creating stress, sowing confusion, and stoking fears of being left out or outmaneuvered. Is now the time? How do I find a good agent? Is working with an educational agent ethical? How do I create a contract? How much should I pay an agent the first year (and subsequent years)? If you're wrestling with these questions, we have some helpful tips to help lay the foundation for working with educational agents.

It can be beneficial to establish effective and trusting relationships with educational agents, especially for enrollment professionals at boarding schools or schools with homestay programs. These agents can play a crucial role in finding right-fit students and can help you achieve your enrollment goals.

Questions often arise regarding the ethics of paying fees to educational agents and whether they can be trusted to deliver on their promises. For North Americans, the appearance of an ethical conflict stems from the more common practice of working with trustworthy, well-informed domestic independent admissions consultants who do not charge fees to schools. It is important to put the business practices of international educational consultants into context. Overseas agents often have not had the luxury of growing up in a wealthy society and are unable to come to this business practice in the same manner as domestic independent admissions consultants. This reality doesn't make educational agents any less sincere in their efforts to find a wonderful educational experience for their families. When educational agents perform their job professionally, they are helping both the families and you.

In general, trustworthy agents do not charge their families. That said, it is true that some agents may charge families a small up-front fee. This fee is often needed to identify families who are committed to the admission experience and have the resources to support the full process. Keep in mind that agents work with a relatively high financial risk. Agents do not receive fees from schools until almost a year after engaging with a family. They only receive payment once a child is enrolled and tuition fees are paid. Typically, agents ask for 10% of the student's paid tuition and board fees for the first year and, in recent years, up to 5% for the second year. While fees may raise concerns about agents' motives, it is important to vet agents diligently while weighing the benefits they bring to the table.

TIP: IF A STUDENT IS ADMITTED TO A SCHOOL ON A PARTIAL SCHOLARSHIP, THE SCHOOL SHOULD NEVER PAY FEES ON THE AIDED PORTION OF A STUDENT'S CONTRACT.

Many education agents have extensive networks and connections in various countries which can allow them to tap into pools of potential students you may not have access to otherwise. They can provide valuable insights into local education systems, cultural nuances, and academic standards. This knowledge can help you better understand a new market and identify the most suitable candidates for your school. Agents may also know other local schools and organizations which can buttress your recruitment in the area.

TIP: LEARN ALL THAT YOU CAN FROM AN AGENT! CONSIDER THEM A DE-FACTO TUTOR FOR THEIR CITY AND/OR COUNTRY AND UTILIZE THAT KNOWLEDGE TO EXPAND YOUR CONNECTIONS IN THAT CITY AND COUNTRY.

Be sure to perform due diligence when choosing to partner with an agent. You should always review their track record and seek recommendations from colleagues who may have previously collaborated with them. Establish clear expectations and contractual agreements up front to ensure a fair and transparent partnership. Before engaging in any agreement, clarify the fee structure and ensure it aligns with industry standards. Discuss the specific services the agent will provide, such as student recruitment, application assistance, translations for the parents (both on Zoom and with documents), and the type of ongoing support that both you and the families may need. Consider implementing a system of checks and balances and regularly monitor the progress and performance of the education agents with whom you work. Keep the lines of communication open and check in regularly.

Remember that YOU are always in control. You write the contracts, you set the fees, and you are the authority in the enrollment process. You never have to accept a student who does not meet your admissions criteria or the mission of your institution.

The ultimate goal is to find the right-fit students who will thrive in your school environment and contribute positively to the community. Educational agents can be valuable allies in achieving this objective but it is crucial to approach the relationship with some caution. At the same time, you can balance your caution with optimism as these agents can have the potential to grow into lifelong friends.

THE AGENT PERSPECTIVE

"Visiting schools and meeting the admissions teams is an essential part of our role. For us at Claire Calder Consultancy, it is about building relationships and really understanding the culture and ethos. Boarding school is so much more than academics alone so knowing a school in depth ensures students are placed in the right school where they can grow in confidence and achieve their full potential."

CLAIRE CALDER
Claire Calder Consultancy

For more information on agents, and how to work with them and/or find them abroad, join EMA at our overseas agent events every semester. You can also meet with our global team at the annual conference, or schedule a call with them at your convenience.

Visit enrollment.org for more information.

JOHN WILLIAMSON

John has spent his entire career working on with schools and students in the international enrollment management arena. Most recently, John was the executive director of Linden Educational Services, where he spent a decade researching new markets for boarding schools across the globe and facilitating strategies, programming, and recruitment tours. He is well known for his lectures and presentations and can often be found speaking at national conferences for heads, deputy heads, and enrollment professionals across the globe. Yearly, John visits, researches, and develops connections with schools, organizations, and government officials in 40 to 50 countries.

The Head-Royce admissions team, from left: Diamond Bouchelion, Gretchen Wu, Kathrina Weekes, Amanda Lacro, and Jason Nuñez

Head-Royce School (CA): Kathrina Weekes, Director of Enrollment Management

The Yield asked Head-Royce's Director of Enrollment Management Kathrina Weekes for an insider look at their admission season, particularly their approach to financial assistance as a school that awarded $7.1 million in aid for the 2023-24 school year.

What do you think is an essential component of a successful enrollment team?

We begin the season each year by conducting a DiSC (personal assessment tool) survey to learn about each team member's unique attributes. This allows us to see where we may or may not be naturally successful in our communication and learning styles, and where we may have opportunities for growth. We also ensure that our actions and work align with our school's institutional priorities and goals.

How has your enrollment strategy changed since 2020?

We have reevaluated our prospective family programs to ensure they are still relevant and tweaked prospective events and communications to match what families are looking for in the marketplace based on the NAIS article "Jobs to Be Done."

For example, we decided to maintain virtual interviews in our upper school to accommodate families' busy schedules, added an Admitted Family Day right after decisions go out to help with the number of revisits we have the following week, and shifted to student-led tours by our New Crew, the student ambassador team.

What role does your Character Skills Snapshot play in your enrollment process, and why do you find it valuable?

The Character Skills Snapshot helps us understand how students see themselves in relation to how their peers or teachers see them. It also helps us when we are putting together advisory groups so that we can best balance students' unique attributes across all of the advisories.

What innovative, effective approaches regarding financial assistance have you taken?

We have partnered with peer schools to offer information sessions regarding the affordability of an independent school education. With our own prospective families, we offer workshops so families can set up budget tools and try to demystify the process of applying for tuition assistance. Together, these two tools have positively increased our applications for tuition assistance, and we now have a broad spectrum of socioeconomic diversity in the application process.

What insight can you offer to an enrollment team that might be in the midst of a challenging season?

Make decisions that align with your school's goals, set yourself up to achieve your aspirations, and reach out to your peer schools for support. Someone may have experienced the same challenge.

What is the most significant admission challenge you've recently faced?

Our recent challenge has been enrolling an exact number of students when using a conditional use permit (CUP), which involves adhering to the conditions set forth in the permit itself and may include limitations on the number of students allowed. We currently have a CUP for 906 students in grades K-12.

We do whole-school enrollment—which means we look at the entire school and consider factors such as class sizes across all grade levels rather than looking at a grade as a solo unit—and put in place mechanisms to monitor and track student enrollment throughout the enrollment period. This involves maintaining accurate records of enrolled students, conducting regular audits, and ensuring compliance with the terms of the CUP for reporting during the month of October. By following these steps and closely adhering to the conditions outlined in the conditional use permit, we can effectively enroll the exact number of students permitted while ensuring compliance.

How do you determine your financial assistance model?

Our tuition assistance model involves providing financial assistance to students and families who demonstrate financial need. We want to ensure continued access to our educational program across a wide range of socioeconomic needs. About 25% of our families receive grants—from $1K to full tuition.

Families interested in financial aid typically complete a financial aid application form provided by the school that requires detailed information about the family's financial situation. Then the school's tuition assistance committee reviews the applications. Financial need is assessed based on the information provided by the family, considering factors such as income, assets, family size, number of dependents, and any special circumstances. The school calculates the family's demonstrated financial need by subtracting the suggested family contribution from the school's tuition and fees; the suggested family contribution is typically determined using a standardized methodology and policy simulators, which help determine the award allocation.

We then notify families of their financial aid awards, including the amount of assistance offered and any conditions or requirements associated with the award. Families can accept, decline, or appeal their tuition grants. Awards are often renewable annually, contingent upon the family's continued demonstrated financial need and the student's satisfactory academic progress; therefore families are required to submit updated financial information each year so that Head-Royce can confirm their eligibility for a need-based grant.

How has the economy impacted your trends in tuition costs?

As a school located in Northern California, tuition trends have affected families who, 10 years ago, may not have qualified for financial aid. The number of middle-income families has risen about 25%, so we are talking to families about the total cost of attending an independent school for potentially 13 years and also talking to them about where they want to spend their dollars and which years of their child's education they want to dedicate toward independent schools.

How do you celebrate as a team at the end of the enrollment season?

Our team does a couple of things at the end of the enrollment season. Recently, we had dinner together after we launched all of our decisions to families. Then in May, we have an annual retreat to celebrate the wins and look at our areas of growth together over the year. This year, we will probably return to Topgolf. That's how we started the year.

> **"The Character Skills Snapshot helps us understand how students see themselves in relation to how their peers or teachers see them."**

Meet the Admission Team

KATHRINA WEEKES, Director of Enrollment Management, oversees and is responsible for the Office of Admissions and Enrollment, leads the Head-Royce admission team

AMANDA LACRO

Senior Associate Director of Enrollment Management, supports the team's day-to-day operations and is the director of the financial assistance process

GRETCHEN WU

Assistant Director of 9–12, is responsible for recruiting families for 9–12 grades, school visits, and family tours

JASON NUÑEZ

Associate Director of K–8, is responsible for the application process for families enrolling in K–8 grades

DIAMOND BOUCHELION

Admissions Office Coordinator, whose responsibilities include supporting the director of enrollment management and maintaining the Ravenna database and other systems

Enrollment
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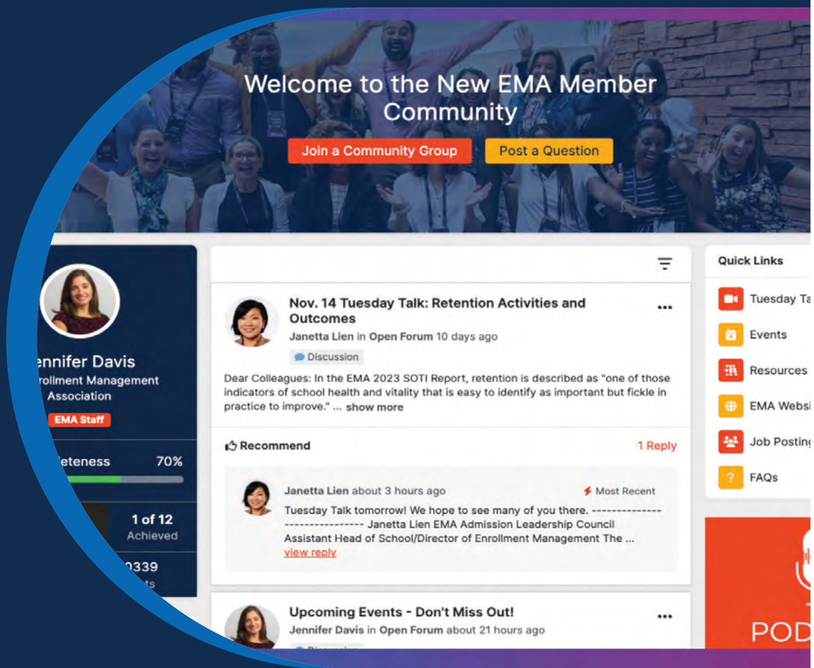
EMA's Online Member Community

The Future of Collaboration



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For more information on EMA's Online Member Community, contact EMA's Membership & Business Development Team at members@enrollment.org or visit enrollment.org.

Field Trips

From Las Vegas to Vermont to Honolulu, EMA members have been crisscrossing the country, learning new insights, growing their skills, becoming stronger leaders—and having lots of fun along the way!

Clair P. Goldsmith, EMA's Board Chair; Angel Solano, Assistant Director of Admission, Grades 7-12, Oakwood School (CA); and Cristina Delgado, Associate Director of Admission, The Buckley School (CA) at the ALC Spring Seminar, May 2023.

Nora Dock, Director of Admissions, Vermont Academy & John Williamson, EMA, Director of Global Membership & Business Development

From left: Nathalio Gray, Assistant Head of School for Mission Advancement, The Branson School (CA); Mylesa Alexander, Director of Enrollment, The Saklan School (CA); Nichole Leon, Director of Admissions, La Scuola International School (CA); Roxy Nielsen, Associate Director of Admissions, Episcopal Day School of St. Matthew (CA); Lloyd Brown, Associate Director of Admissions K-8, Bentley School (CA); Amanda Lacro, Senior Associate Director of Enrollment Management, Head-Royce School (CA); and Jason Nuñez, Associate Director of K-8 Admission, Head Royce School (CA) at the EMA Annual Conference in Las Vegas, NV.

More than 165 enrollment professionals gathered at the Viewpoint School this past May in Los Angeles, CA, for the Enrollment Management Leadership Council seminar series, where they celebrated enrollment wins and gained valuable insights for the fall admission season.

Celebrating Peter Frew, Director of Admissions, The Taft School (CT), and his upcoming retirement at EMA's Admission Directors Institute (ADI) at EMA's Annual Conference, Las Vegas, NV.

From left: Lon Wysard, Associate Director of Admissions, Punahou School (HI); Deanna D'Olier, Associate Director at Hawai'i Association of Independent Schools, Heather Hoerle, EMA's CEO and Executive Director, and Jeff Shields, President and CEO at NBOA in Honolulu, HI.

From left: Ari Betof, Co-Founder and Partner, Mission & Data; Christina Dotchin, EMA's Vice President of Member Relations; and Allison Davis, EMA's Assistant Director of Membership & Business Development present findings from EMAs' 2023-2024 The Ride to Independent Schools Report at the Florida Council of Independent Schools Conference in November 2023.

Accept community.

"The Character Skills Snapshot has become an indispensable tool in our admission process, helping us identify students who not only possess academic excellence but also demonstrate the emotional intelligence necessary for fostering a collaborative and inclusive learning environment."

-Amy Sayfie Zichella, Director of Admission and Enrollment Management, Ransom Everglades School (FL)

EMA
Character
Skills Snapshot

www.enrollment.org/snapshot

THE Yield

Thank You to Our Authors, Contributors, and Readers

We're thrilled to provide you with this spring issue of The Yield, packed with valuable insights and professional development tactics to help you achieve your enrollment goals. We hope you found this issue informative and came away with numerous tips and tools to help you successfully do the work you do.

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

Submit to *The Yield*

Do you have a great tip, a favorite best practice, a streamlined process, or other expertise to share in a future issue of *The Yield*? We want to hear from you.

EMA welcomes content submissions from contributors throughout the year for our various publications and are always on the lookout for fresh ideas, advice, and thought-provoking articles and stories. Share yours today.

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THE Yield

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