



Shipleigh

— 125 YEARS OF —
CHANGEMAKERS

Admissions Projections: Dashboard or Data

The Shipley School

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The Shipley School

- **PK-12 coed day school, 830 students**
- **Located outside of Philadelphia & founded in 1894 as an all girls school with boarding**
- **Mission – Academic rigor, Love of learning & Compassionate Participation**
- **Focus on character and Positive Education**
- **Tuition – \$22,800 - \$38,500**
- **35% of students receive tuition assistance**

Positive Education

Positive Education is an evidence based approach to education that simultaneously advances academic excellence, well being, and character development.

Presentation Overview

- **Collaborative and integrated approach between the Enrollment and Business Offices**
 - Enrollment projections
 - Setting budgets and tuition revenue goals
 - Tuition Assistance budgeting and allocation process
- **Managing enrollment expectations**
- **Strategic conversations on the financial stability of the school from all perspectives**
- **Accurate use of data trends to make decisions**

Setting Projections

- **Setting the stage early in the process**
- **Collaborative approach**
- **Data driven – both an art and a science**
- **10 & 5 year numbers & now 3!**
- **Learning from the funnel**

	2016/17	2017-18					2017-2018	2017-2018	2018-19			
		RF 2017/18	Attrition %	Attrition Avg	New Avg	Calculated Proj	Prelim Proj	Revised Proj	RF 18/19	Attrition Avg	New Avg	Calculated Proj
PK	13			0	14	14	15	13		0	14	14
K	28	13	10.3%	-1	13	25	23	25	13	-1	13	25
1	34	28	11.7%	-3	5	30	32	28	25	-3	5	27
2	34	34	7.6%	-3	4	35	34	36	28	-2	4	30
3	34	34	3.4%	-1	4	37	36	34	36	-1	4	39
4	40	34	7.9%	-3	8	39	36	38	34	-3	8	39
5	56	40	6.7%	-3	6	43	44	42	38	-3	6	41
6	59	56	5.9%	-3	13	66	70	59	42	-2	13	53
7	65	59	4.3%	-3	9	65	68	66	59	-3	9	65
8	89	65	6.1%	-4	9	70	70	71	66	-4	9	71
9	106	89	12.5%	-11	31	109	105	111	71	-9	31	93
10	94	106	5.5%	-6	6	106	105	106	111	-6	6	111
11	103	94	3.0%	-3	7	98	95	98	106	-3	7	110
12	91	103	1.7%	-2	0	101	100	103	98	-2	0	96
Total	846	755	6.0%	-46	129	838	833	830	727	-42	129	814

Year 3				Year 4				Year 5			
Attrition			Calculated	Attrition			Calculated	Attrition			Calculated
RF Prior	Avg	New Avg	Proj	RF Prior	Avg	New Avg	Proj	RF Prior	Avg	New Avg	Proj
	0	14	14		0	14	14		0	14	14
14	-1	13	26	14	-1	13	26	14	-1	13	26
26	-3	5	28	26	-3	5	28	26	-3	5	28
27	-2	4	29	28	-2	4	30	28	-2	4	30
29	-1	4	32	29	-1	4	32	30	-1	4	33
33	-3	8	38	32	-3	8	37	32	-3	8	37
44	-3	6	47	38	-3	6	41	37	-2	6	41
42	-2	13	53	47	-3	13	57	41	-2	13	52
52	-2	9	59	53	-2	9	60	57	-2	9	64
60	-4	9	65	59	-4	9	64	60	-4	9	65
70	-9	31	92	65	-8	31	88	64	-8	31	87
93	-5	6	94	92	-5	6	93	88	-5	6	89
94	-3	7	98	94	-3	7	98	93	-3	7	97
115	-2	0	113	98	-2	0	96	98	-2	0	96
699	-40	129	788	675	-40	129	764	668	-38	129	759

Checking In

- **Month by month net enrollment averages**
- **Monthly and mid-month funnel comparisons**
- **Weekly new student enrollment comparisons**

Taking Note

- How do you run projections for the coming year and beyond?
- What do you do differently that works well?
- How do you combine data with market knowledge?

Old Way

- **One big tuition assistance budget**
- **First come, first served**
- **Budget – what budget?**
- **Silo approach**

Goals

- **Move away from a first come-first served approach to TA**
- **Be intentional about how we distribute TA, recognizing this is sometimes more of an art than a science**
- **Have a commitment to TA PK-12, not just in Upper School**
- **Better socio-economic diversity in each grade**
- **Also use TA as a tool to assist with racial and ethnic diversity**

Trends

% of TA/ Overall Population	08-09	18-19	Change
LS	17%	37%	20%
MS	23%	37%	14%
US	28%	34%	6%
Total	22%	35%	13%

More students are now qualifying for financial aid.

\$ Spent on TA	08-09	18-19	Change
LS	\$ 693,200	\$ 1,721,575	\$ 1,028,375
MS	\$ 815,500	\$ 1,719,020	\$ 903,520
US	\$ 1,652,300	\$ 3,886,516	\$ 2,234,216
Total	\$ 3,161,000	\$ 7,327,111	\$ 4,166,111

Shipley's budget for financial aid has doubled in 8 years.

<u>Grade</u>	<u>Current Enrollment</u>	<u>Current Tuition</u>	<u>Current Students on FA</u>	<u>Current Year Awarded</u> (moved each grade up one)		<u>Projected Tuition</u>	<u>Projected Students on FA</u>	<u>Projected Step + Tuition Increase</u>		<u>Original % of budget</u>	<u>Proposed % of Budget</u>	<u>18-19 Projected Budget at 814</u>	<u>Difference</u> (Budget minus Award)
PK	13	22,030	5	\$86,500	1.28%	22,911		\$0		3.0%	1.25%	\$87,500	\$87,500
KG	25	25,300	12	\$225,950	3.34%	26,312	5	\$106,964		3.0%	2.75%	\$192,500	\$85,536
1st	29	28,500	10	\$219,475	3.25%	29,640	12	\$274,924		4.5%	4.00%	\$280,000	\$5,076
2nd	36	28,500	13	\$266,100	3.94%	29,640	10	\$228,254		4.5%	3.50%	\$245,000	\$16,746
3rd	34	30,630	14	\$288,059	4.26%	31,855	13	\$305,542		4.5%	4.50%	\$315,000	\$9,458
4th	38	30,630	10	\$190,445	2.82%	31,855	14	\$299,581		4.5%	5.00%	\$350,000	\$50,419
5th	43	30,630	18	\$368,975	5.46%	31,855	10	\$198,063		6.0%	3.00%	\$210,000	\$11,937
6th	59	33,900	15	\$337,350	4.99%	35,256	18	\$444,948		6.0%	7.50%	\$525,000	\$80,052
7th	66	33,900	25	\$561,260	8.30%	35,256	15	\$350,844		8.0%	5.50%	\$385,000	\$34,156
8th	72	33,900	28	\$588,775	8.71%	35,256	25	\$583,710		8.0%	8.50%	\$595,000	\$11,290
9th	111	37,200	36	\$1,020,200	15.09%	38,688	28	\$708,422		12.0%	14.25%	\$997,500	\$289,078
10th	106	37,200	35	\$945,650	13.99%	38,688	36	\$1,061,008		12.0%	15.00%	\$1,050,000	-\$11,008
11th	98	37,200	29	\$767,625	11.36%	38,688	35	\$983,476		12.0%	14.00%	\$980,000	-\$3,476
12th	103	37,200	35	\$892,400	13.20%	38,688	29	\$798,330		12.0%	11.25%	\$787,500	-\$10,830
	833		285	\$6,758,764				\$6,344,067		100.0%	100.00%	\$7,000,000	\$655,933

New Way

- Collaborative approach – Business Office
- Percentage-based grade level allocations
- Allocations for new & returning students
- Budget set in September based on enrollment projections

Taking Note

- **Is your process collaborative?**
- **What are your top priorities & goals in managing enrollment expectations?**

Tuition Assistance at Shipley

- Collaborative approach – Admissions Team & Business Office
- Need-based grants
- School & Student Services (SSS)
- Tuition Assistance Committee

Enrollment & TA Timeline

- **September – Budgets & Projections**
- **December – Returning Families TA due date**
- **January – New Families TA due date**
- **January – TA Allocations**
- **February – Contracts and TA Letters**
- **March-August – Rolling TA review**

Enrollment & TA Timeline

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Tuition Assistance Allocation

- **Admission Directors & CFO**
- **Building each class a grade at a time – an investment in each student**
- **Priorities by grade level & division**
 - Gender
 - Academic Strengths
 - Talents
- **Diversity**

Projection 32

Total 89, Attrition 9, New 30, Goal 110

Grade	Status	Scholarships	Tuition	Parent Contribution	Awarded	Enrolled	Notes
9	Enrolled	Centennial, McGuire	38,500	1,000	37,500	37,500	ABC/Basketball Player/Top Choice/Centennial Finalist
9	Enrolled		38,500	7,000	31,500	31,500	Soccer Player/FAWL last year
9	Enrolled	McGuire	38,500	2,500	36,000	36,000	LAX Player
9	Enrolled		38,500	3,000	35,500	35,500	Academics/Violin
9	Enrolled		38,500	3,000	35,500	35,500	Performing Arts - Phil Brown
9	Enrolled	McGuire	38,500	16,000	22,500	22,500	Top Soccer Player
9	Enrolled		38,500	28,000	10,500	10,500	Sibling/Squash Player
9	Enrolled	McGuire	38,500	10,000	28,500	28,500	Past Family/Basketball Player
9	Enrolled	Ebert, Centennial	38,500	2,000	36,500	36,500	ABC/Diversity/Centennial Finalist
9	Enrolled		38,500	10,000	28,500	28,500	Stepping Stones
9	Enrolled		38,500	3,500	35,000	35,000	Faculty
9	Enrolled		38,500	6,000	32,500	32,500	Father is an Alum/Centennial Finalist
9	Enrolled		38,500	15,000	23,500	23,500	Soccer/Baseball Player
9	Enrolled		38,500	500	38,000	38,000	STEAM/Centennial Finalist
9	Admit		38,500	8,000	30,500		Centennial Finalist
9	Admit		38,500	10,000	28,500		TPS/Music and Performing Arts
9	Admit		38,500	2,000	36,500		Baseball Player
9	Admit		38,500	5,000	33,500		Softball Player--not recruit
9	Admit--FAWL		38,500				ABC
9	Admit--FAWL		38,500				Diversity
9	Admit--FAWL		38,500				Diversity
9	Admit--FAWL		38,500				Violin/Voice
9	Admit--FAWL		38,500	2,250			Top Basketball Recruit
9	Admit--FAWL		38,500				Crew
9	Admit--FAWL		38,500				Rosemont/Sibling
9	Admit--FAWL		38,500	12,000			Montgomery School/Strong app
					523,000	431,500	

Guiding the Way

- **Tuition Assistance Policy & Procedure Manual**
- **Enrollment Management Plan**
- **New Tuition Assistance explainer video**

Strategic Plan

Stewardship – School Size

- Longer Term Projections
- Net Tuition Revenue Models
- School Size by Division
- Data and Research
- New Enrollment & Tuition Assistance Dashboard



Thank you!

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