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Essential Questions and Data for Trustees

Note: Currey Ingram's version of this document includes our answer to all these question. Most of the questions in Currey Ingram's version include links to benchmarked data that answers the particular question.

Governance

1. Is there a strategic plan?
2. Is there a strategic financial plan?
3. Is tuition rising, in line with inflation?
4. Who were the last five heads of school and length of tenure?
5. What is name of the auditing firm?
6. What was their top recommendation(s)?
7. What are the key bylaws and articles of incorporation?
8. What are the terms for trustees & officers?
9. What are the names of all the Board subcommittees?
10. What is the percentage of LD schools in the NAIS?

Facility

1. How many acres is the campus?
2. How many square feet of indoor space?
3. What is the square footage per student?
4. What is the annual budget for the physical plant?
1. What is the total number of computers available for student use?

General Finance

1. What is the total budget?
2. What is the operating surplus/deficit?
3. What is our income less expenses versus benchmarks?
4. How does tuition compare with benchmarks?
5. How does Net Tuition Revenue compare with benchmarks?
6. How much is in the endowment?
7. What is the total debt?
8. What is the annual budget for food services?
9. What is our expenditure on PD?
10. Are there profit centers and what do they net?
11. What are the other key ancillary programs of the school and what do they net?

Advancement

1. How much did the AF generate last year?
2. What is the parent participation rate?
3. Other fundraising events?

Tuition Discounts/Financial Aid

1. What is the need based financial aid budget?
2. How many students does it serve?
3. What's the percentage of the total budget?
4. What is the tuition remission policy?

Staffing & Compensation

1. What are the starting, median and high end teacher salaries?
2. How do salaries compare with benchmarks?
3. How do our personnel counts compare with benchmarks?

Admission/Enrollment

1. How does CIA enrollment compare with benchmarks?
2. What does our key Admission data tell us?
3. What is the attrition rate and how does that compare with benchmarks?
4. What is the annual enrollment trend?
5. What is the target enrollment?
6. What is the average class size per division?

Essential Questions: Digging Deeper with Data

NAIS 2019
Jeffrey L Mitchell
Head of School
Currey Ingram Academy

Objectives

1. *Demonstrate how some of your most important questions can be answered objectively, accurately, and thoughtfully, using data.*
2. *Share “Essential Questions” (and answers) that trustees, Heads, CFO’s and other senior administrators will likely appreciate.*
3. *Share some useful features of DASL.*
4. *Share some other ideas regarding data usage.*
5. *Go beyond DASL and dig deeper into the data.*

The Origin Story

1. 20 questions (and answers) that every trustee should know...
2. *Do you and your trustees know the answers? Yes/No format*

[Kahoot: 25 Essential Questions for Trustees, Heads of School and CFOs](#)

Essential WHY?

Data to support wise strategic decision making

Pre-test

From 1-4, [rate](#) how well you use data to inform strategic decision making?

DASL Features

Comparison/Custom Groups

1. Already a wealth of Comparison Groups
 - a. NAIS, Type of School, Enrollment, Association, Regional, State

2. Custom groups
 - a. Local schools e.g., ISNA
 - b. LD schools e.g., Short List
 - c. Note: minimum number of comparison schools required

DASL Features

DASL Databook (see example)

1. Comprehensive set of comparisons
2. Choice of comparison group
3. Integrates demographic data at the desired level

Setting the Stage

Question posed (or decree made)

Some Essential Questions

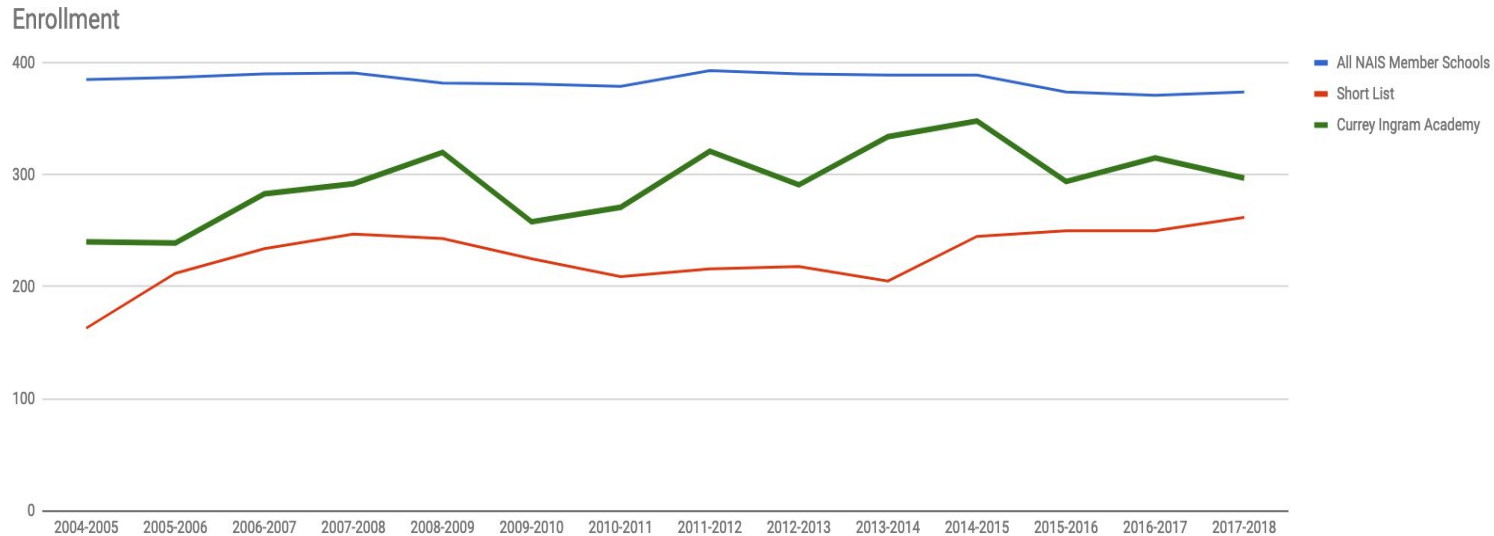
1. *There are too many children in my child's class/grade!*
 - a. **How do our student ratios compare to benchmarks?**
2. *We are too expensive!*
 - a. **How does our tuition compare with benchmarks?**
3. *Our tuition has increased way too much in recent years?*
 - a. **What have been the primary drivers of beyond inflation tuition increases?**
4. *We do not pay our faculty/staff well!*
 - a. **How well do we compensate our faculty/staff compared to benchmarks?**

Essential Questions

1. *We have too many faculty/staff? We have too few faculty/staff?*
 - a. **How do our staffing ratios compare with benchmarks?**
2. *We are losing so many good families!*
 - a. **How does our attrition rate compare with benchmarks?**
 - b. **What would our enrollment be if we had normal attrition?**
3. *OMG Singapore is kicking our butt in math!*
 - a. **Where do we (independent schools) fall on those international tests?**

How does enrollment compare with benchmarks?

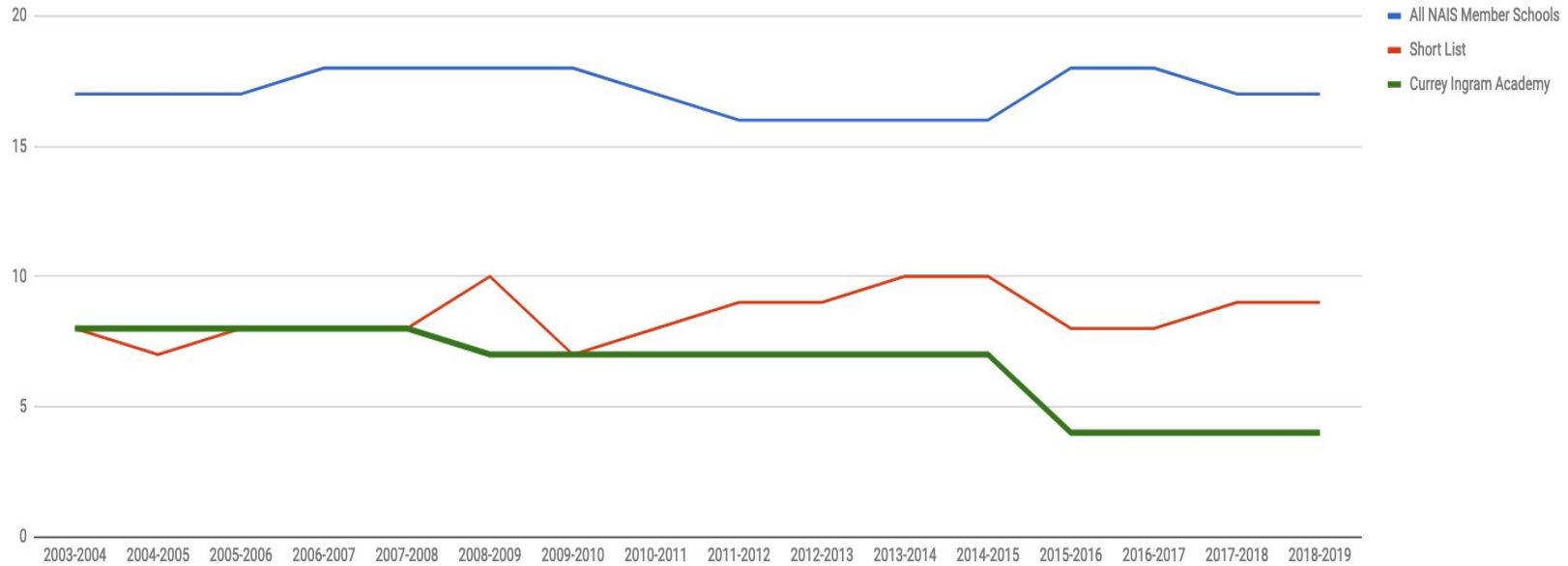
Talking points...



How do our student ratios compare with benchmarks?

*Class sizes
are too big!*

Average Class Size Grades K-5

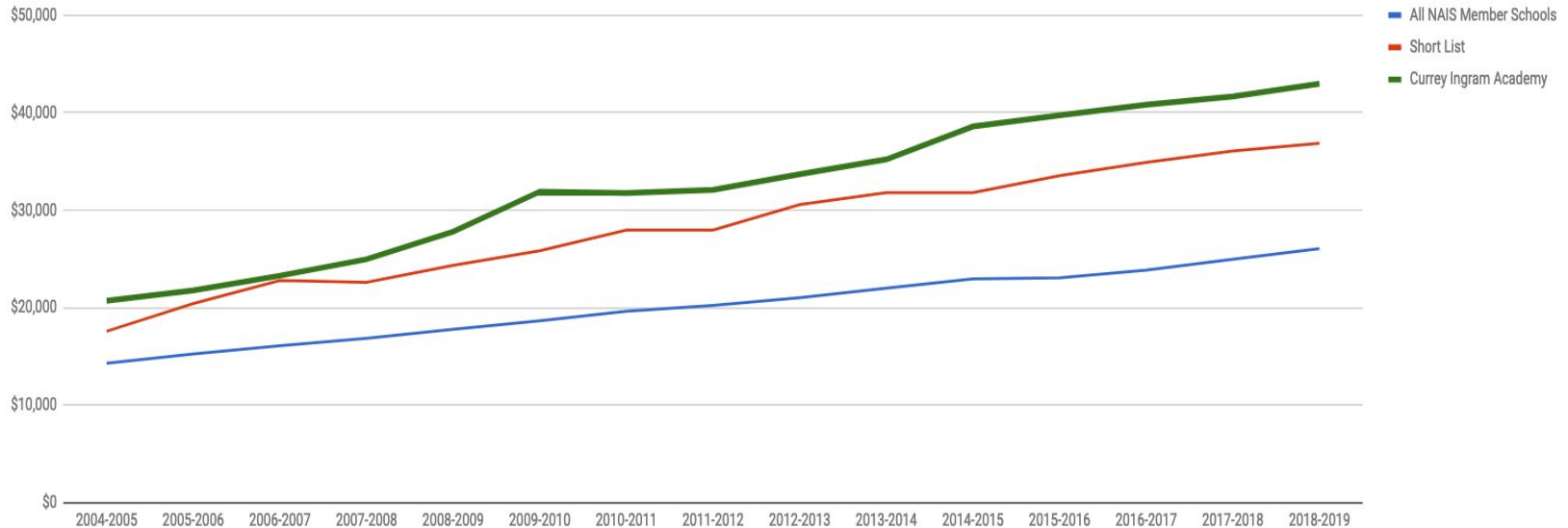


We are too expensive?

How does our tuition compare with benchmarks?

Talking points...

Tuition & Fees



What have been the primary drivers of beyond inflation tuition increases?
OR, What expense lines have influenced the budget more than others?

Part 1: [Administrative staffing](#) -
(FastStats)

“Why?”

1. Fact: more admin/student
(NAIS)

- a. 2001-2002: 41:1
- b. 2018-2019: 24:1
- c. 40% change

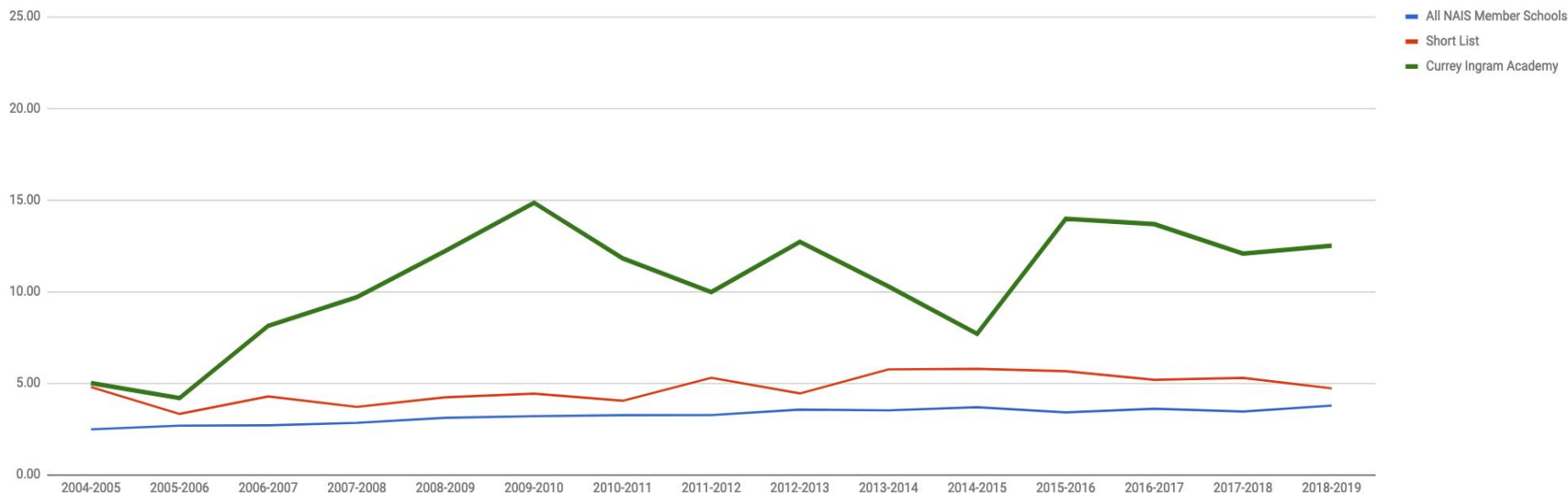
- 1. Bloat?
- 2. Strategically responding to the needs of the times?
 - a. Head's role evolved? Internal to external?
 - b. Response to the complexities of our time...
 - i. More admin positions needed (e.g., learning support, diversity, global education, technology, service learning)

What have been the primary drivers of beyond inflation tuition increases? OR, What expense lines have influenced the budget more than others?

Part 2: Administrative Staffing

We have too many faculty/staff? We have too few faculty/staff?

Total Full-Time Equivalencies Administrators per 100 Students



What have been the primary drivers of beyond inflation tuition increases?
OR, What expense lines have influenced the budget more than others?

Part 3: [The Technology Arms Race in Independent Schools Continues](#) (FastStats)

1. Technology expenditures have skyrocketed
2. Larger schools (thus economies of scale) allocate significantly more per student
3. However, mid-size and smaller schools have had greater proportional increases
4. The *arms race* impacts budgets of medium size and smaller schools more as they try to “catch-up”
5. Has there been an impact on *student achievement*?
 - a. Has this investment in technology improved / enhanced student outcomes?
 - b. Hattie (*Visible Learning*)
 - i. The evidence that technology positively impacts *student achievement* is negligible

What have been the primary drivers of beyond inflation tuition increases?
OR, What expense lines have influenced the budget more than others?

A cautionary tale

1. Market reaction
 - a. Increasing number of “no-frills” independent schools
 - i. NAIS President Donna Orem in *Looking Ahead: New School Models*
 - b. Growing number of schools with expanding missions / admissions
 - i. SAIS Learning Support Conference
2. And so we evolve...
 - a. Clearly a push to add more programming, and as a result more staffing...
 - b. Whether a savvy response to the market, or a programmatic arms race, the beyond inflation impact on tuition is clear...and so is the market reaction

How well do we compensate our faculty/staff compared to benchmarks?

1. Go beyond DASL for the best data
2. Choose the most logical comparison groups
 - a. National, Regional, Local
 - b. Develop a standard/goal

Know your talking points...

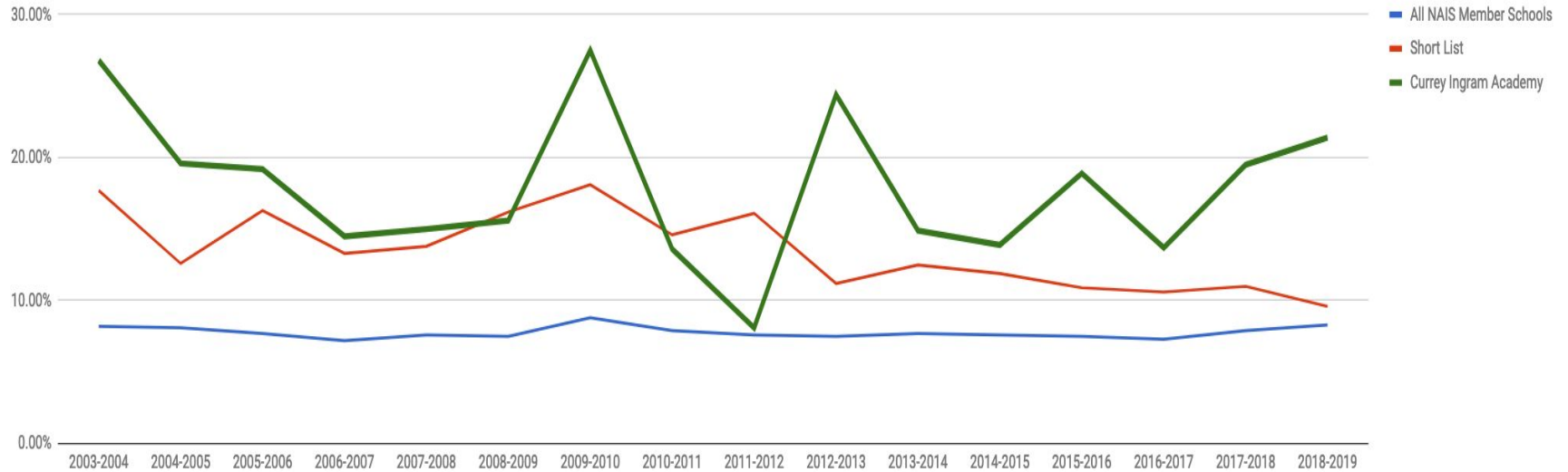
- Compared to our benchmark...
- We have done the following...
- We aspire to...

We do not pay our faculty/staff well!

How does our attrition rate compare with benchmarks?

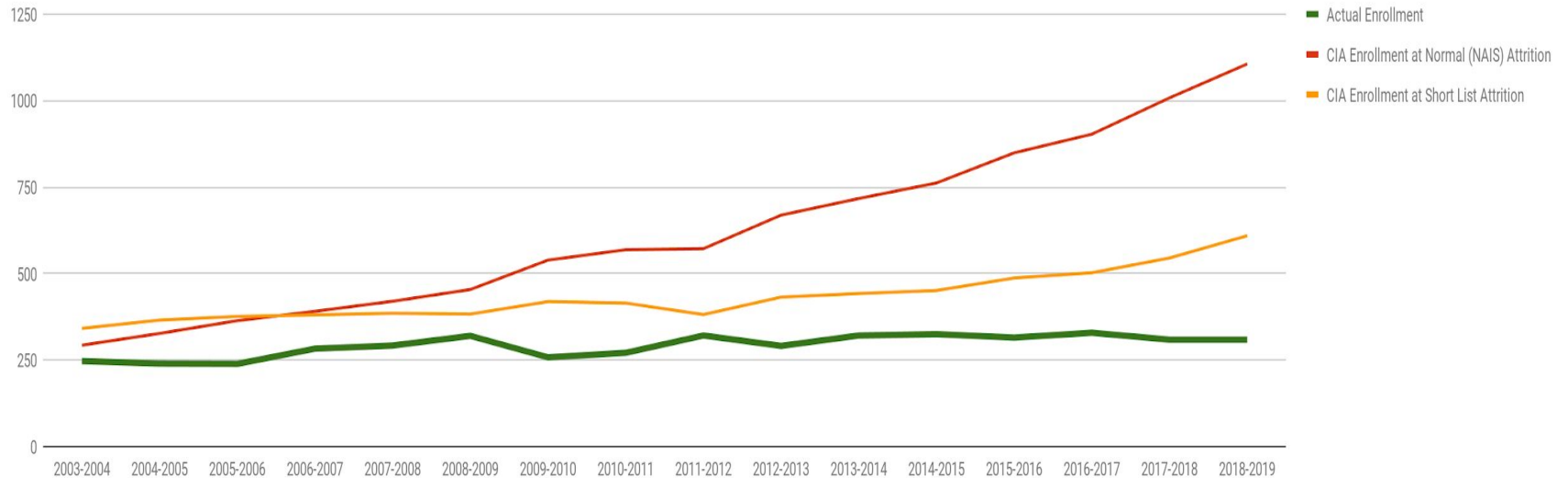
We are losing so many good families!

Attrition Rate



What would our enrollment be if we had normal attrition?

Enrollment Potential



Where do independent schools fall on those international tests?

1. [FastStats on PISA results](#)
2. Press release: *US Students Flounder on International Academic Comparisons*

OMG Singapore is kicking our butt in math!

Where do independent schools fall on those international tests?

1. Program for International Student Assessment (PISA) - OECD
2. Compare education systems worldwide - 15-year-old students in reading, math and science
3. 500,000 students / 65 economies representing 28 million 15-year-olds
4. Compared to 64 First, Second and Third World Countries
 - a. US 26th in math and 21st in science
5. U.S. spends more per student than most countries e.g., Slovak Republic = \$53 000 per student / United States, = \$115 000 per student

Where do independent schools fall on those international tests?

Are NAIS schools immune to the narrative?

1. Schools by the hundreds have overhauled their math programs in lieu of more PISA-friendly program

Where do independent schools fall on those international tests?

Essential question, was not answered.

1. How do independent (NAIS) schools perform on the PISA?
2. PISA does not disaggregate independent schools...

Where do independent schools fall on those international tests?

Reasonable proxies allow for insight however...

1. PISA disaggregates into a category called “USA Private”
 - a. All private schools...NAIS independent schools are a minority
 - b. Marginally better than all-inclusive score

Where do independent schools fall on those international tests?

Proxy: NAIS schools on a similar standardized achievement test

1. ERB CTP
 - a. National, Suburban & Independent School Norms
 - b. Moreover, grade level norms (including 10th, which allows for a comparison to the PISA sample)
 - c. Rolling three-year figures...statistically sound
 - d. Independent schools score above the 90th percentile on the math subtests (National Norms)

Where do independent schools fall on those international tests?

Assumption: NAIS student performance on the CTP math subtest is a proxy for performance on the math subtest of the PISA

1. Similar tests: samples, what they measure i.e., school achievement in math
2. Thus, if NAIS students score similarly (90th percentile) on the PISA, the scaled score = 592
3. Top three in the world! OMG we hang with Singapore!
4. Good news story for NAIS schools...Not so much for for the American education system as a whole: (re)emphasizes the disparities

Digging Deeper

Use survey data, for cross comparisons

1. What are the best predictors/components of overall satisfaction at your school?
2. Regression analysis on Overall Satisfaction using other key variables.

Digging Deeper

Predicting student success at your school

Admission data

1. IVs - test scores, interviews, references

Outcome Data

2. DVs - GPA, Satisfaction, Engagement

Tips for managing and using data

1. A repository of “[Essential Questions](#)” in a Google Doc
2. [ISM’s Strategic Financial Plan template](#)
3. Data Fact as a permanent feature of your board meetings
4. [Finance 101](#) session for parents
 - a. Where are your tuition dollars going?
5. Join a “data club” that shares testing data
6. Create an analytics position

Knowledge Check

1. What do you have questions about?

Summary

Fortify your role as Head, CFO, senior administrator or trustee with ready answers to your essential questions.

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