Getting Strategic About Advancement and Enrollment Goals

Hillbrook School, Los Gatos, CA
Welcome!

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Chief Advancement and Enrollment Officer
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Hillbrook School

- Los Gatos, CA (Silicon Valley)
- Junior Kindergarten - 8th grade (co-ed, day school)
  - 380 students
  - Founded in 1935
  - 14 acre campus
Tell us who you are!

What brought you to this session?

What are you hoping to learn?
What we hope to accomplish

Fueled by Hillbrook’s innovative Advancement Model we hope to tell the story of how we fostered growth by creating a research-based synergy between the enrollment management, marketing-communications, and development teams.

We’ll share the process and tools we use to create strategic plans, measure their effectiveness, and our attempt to be nimble about adapting the plan as necessary.

We’re not experts, we’re just sharing our story.
Hillbrook School Transformation
From 2013-14 to 2018-19 School Years:

- 24% increase in annual giving
- 12% increase in giving per student

- 25% increase in inquiries
- 32% increase in total applications
- 25% increase in enrolled students of color
- 23% increase in total enrollment
It started with questions:

*How might we strengthen our advancement, enrollment and marketing team? What if we created a role that had responsibility for all three areas?*
The 3 Step Plan

Agree on a Shared Mission

Create Collaborative Strategic Plans For Each Department

Implement a Project Management Tool to ensure the collaborative execution of each plan
Collaboration Drives Strategic Efforts

The Entire School Makes an Impact

**Head of School, Administrators & Faculty**
- Leadership
- Attrition Watch
- Student Visits
- Open Houses
- Assessing Students
- Community Building
- Cultivation and Ask
- Stewardship
- Storytelling

**Admissions**
- Enrollment
- Retention
- Recruitment
- Marketing

**Development**
- Objectives
- Key Performance Indicators
- Goals
- Strategies

**Communications**
- Access to Community
- Social Media Outreach
- Storytelling
- Targeted Communications Strategies
- Marketing

**Hillbrook School Parent Council**
- Class Captains
- Parent Ambassadors
- Word of Mouth
- Community Building

**Board’s Role**
- Leadership
- Cultivation and Ask
- Word of Mouth

**Hillbrook School**
The Team - The Office of Advancement and Enrollment (a.k.a. OAE)

Hillbrook School Advancement Model

- Administrative & Executive Assistance
- Transportation, After School & Summer Programs
- Annual Giving & Alumni Relations
- Communications & Community Engagement
- Admission

Build Community: Fill & Fund School
Step 1 - The Shared Vision

The Office of Advancement and Enrollment team at Hillbrook builds community by filling the school and funding the school.
Collaboration between Admissions and Advancement

- Knowing prospective families
  - Joe interviews 70% of families
- New Family Profiles
- Access to New Families
Example of New Family Profile

Family:

Child/Student Name: [Redacted]
D.O.B of student: 09/14/2007
Entering Grade: 6
Address: [Redacted], Los Gatos, CA 95033
Father Email: [Redacted]
Mother Email: [Redacted]
Languages Spoken: English, French, Spanish and Hindi
Sending School: School of Silicon Valley
Parents Name(s): Brian, Smita
Sibling(s): age 3 and age 6
Special Notes: Referred by
Grandparents Name(s):
Grandparents Addresses: Bakshi, India and Alleyne, Ontario, Canada

Family interest(s): I both love the outdoors and are avid backpackers, rock-climbers and scuba divers – time spent on these activities naturally reduced as our three boys were born. Active outdoors outdoors - biking, hiking, swimming, rock-climbing and skiing. We play family board games and travel as a family.

Student interest(s): has a love for athletics, games, music, reading, and friends and the day is never quite long enough for all he’d like to do. He has a love for life in general – ever since he was little. When asked about his school day or an activity he participated in, his response, since he was 5 years old, is something like “oh, it was excellent!” During the weekday, Vivaan plays tennis and learns music after school.

School Involvement: We have taken an active interest at school and in the school community. I was a room parent for a few years, we have chaperoned field trips, volunteered in the classroom, and participated in parent-school dialogs at school. We do this because it’s fun to be with in the class with his friends, and also because it shows Vivaan that we care about his education. He knows that we both have demanding careers, and when we block off our calendars to be at school or to chaperone, it sends a clear message to him that his education is a priority for us.

Research notes:

Education:
- graduated ’04 Harvard Business School, MS & PhD from UC Irvine, Bachelor of Engineering from Delhi Institute of Technology
- graduated in ’94 from UC Irvine, MA & PhD from Princeton Engineering, BA from McGill University

Career:
- Over 16 years experience in engineering, product development and product management. 20+ awarded patents. Strengths include architecture, algorithms, design and problem solving. Additional expertise in design and verification methodologies, infrastructure to facilitate reuse and integration, and experience running and managing teams of engineers. Specialties: switching and queueing theory, traffic management, scheduling, shaping, QoS, system architecture, network processors, fixed/mobile convergence.
- CTO and Co-Founder of since March 2017, prior to that was employed at [Redacted]
Collaboration with Marketing

○ Marketing Plan

○ Inbound Marketing
  ■ Articles/White Papers
  ■ Eblasts
  ■ Automated Emails to Inquiries through SchoolAdmin
  ■ Blog Posts
  ■ Podcast

○ Public Relations
  ■ Article Placement in local publications
  ■ Speaking engagements
Collaboration with Marketing/Communications

Example of a Yearly Marketing Plan

<table>
<thead>
<tr>
<th>Marketing Vehicles</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>July</td>
<td>August</td>
<td>September</td>
<td>October</td>
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<td>Digital</td>
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<td>Re-marketing</td>
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<td>Paid Social</td>
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<td>SEO</td>
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<td>Paid Subscriber E-Blast</td>
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<td>Niche (Paid Profile)</td>
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<td>Radio</td>
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<td>KSBay 94.5 (60 spot)</td>
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<td>Mix 106.5 (60 spot)</td>
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<td>Print</td>
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<td>M Magazine (Open House Directory)</td>
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<td>Sponsorships</td>
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<td>LG Chamber of Commerce Director</td>
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<td>Los Gatos Ballet</td>
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<td>Los Gatos Music in the Park</td>
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<td>Los Gatos Block Party</td>
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<td>Holiday Parade</td>
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<td>Web Services</td>
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<td>Website Upgrade (Blackbaud)</td>
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<td>Vidigami</td>
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<td>Production</td>
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<td>Video Creation</td>
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<td>Brand Photoshoot</td>
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<td>Publications</td>
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<tr>
<td>Hillbrook Quarterly</td>
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<td>Neighbor Newsletters</td>
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<td>Events</td>
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<td>Preschool Outreach</td>
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<td>Parent Education</td>
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<tr>
<td>Open House</td>
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<tr>
<td>Diversity, Equity &amp; Inclusion Night</td>
<td></td>
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<tr>
<td>Education Fairs</td>
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</tbody>
</table>
## Collaboration with Marketing/Communications

A communications tree is put in place for every major project.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Who</td>
<td>When</td>
<td>What</td>
<td>How</td>
</tr>
<tr>
<td>2</td>
<td>HBI/Parent Community</td>
<td>December 13</td>
<td>Announcing Auction Theme, Save the Date</td>
<td>Hillbrook Happenings</td>
</tr>
<tr>
<td>3</td>
<td>HBI/Parent Community</td>
<td>January 10</td>
<td>Save the Date and tickets go on sale next week</td>
<td>Hillbrook Happenings</td>
</tr>
<tr>
<td>4</td>
<td>HBI/Parent Community</td>
<td>January 16</td>
<td>Auction microsite updated and live</td>
<td>Microsite managed by Nicole, Megan/Hillbrook Happenings</td>
</tr>
<tr>
<td>5</td>
<td>HBI/Parent Community</td>
<td>January 16</td>
<td>Internal Bear's Lair Auction page updated and live</td>
<td>Bear's Lair updated, Hillbrook Happenings</td>
</tr>
<tr>
<td>6</td>
<td>HBI/Parent Community</td>
<td>January 16</td>
<td>External Auction page updated and live</td>
<td>External Auction webpage</td>
</tr>
<tr>
<td>7</td>
<td>Parent Community</td>
<td>January 31 and February 7</td>
<td>Silent and Live Donation Items?</td>
<td>Hillbrook Happenings</td>
</tr>
<tr>
<td>8</td>
<td>Parent Community</td>
<td>February 11, 25</td>
<td>Auction Parties highlighted by grade level</td>
<td>Grade Level Parent Emails</td>
</tr>
<tr>
<td>9</td>
<td>Parent Community</td>
<td>February 4, 2017</td>
<td>Final message in TWA: Auction Basket items due?</td>
<td>Grade Level Parent Emails</td>
</tr>
<tr>
<td>10</td>
<td>Internal/External Community</td>
<td>February 5, 2017</td>
<td>Donation Day? One day campaign?</td>
<td>Social Media Campaign</td>
</tr>
<tr>
<td>11</td>
<td>Parent Community</td>
<td>Sunday, February 25th</td>
<td>Class Basket Items/Volunteers</td>
<td>Grade Level Parent Emails</td>
</tr>
<tr>
<td>12</td>
<td>Parent Community</td>
<td>Wednesday, February 14th, 27th, and March 6th</td>
<td>Auction Parties</td>
<td>Hillbrook Happenings</td>
</tr>
<tr>
<td>13</td>
<td>Parent Community</td>
<td>Wednesday, February 28th, March 7, and 14</td>
<td>Class Basket Themes &amp; Items</td>
<td>Hillbrook Happenings</td>
</tr>
<tr>
<td>14</td>
<td>Parent Community</td>
<td>Wednesday, February 28th, March 7, and 14</td>
<td>Ticket prices increasing (on Friday, March 10th)</td>
<td>Hillbrook Happenings</td>
</tr>
<tr>
<td>15</td>
<td>Parent Community</td>
<td>Monday, March 5 and 12</td>
<td>Class Basket Building Party (March 15, 2017)</td>
<td>Grade Level Parent Emails</td>
</tr>
</tbody>
</table>
Collaboration with Marketing/Communications

An example of a communications plan
Step 2 - Create Collaborative Strategic Plans for Each Department

<table>
<thead>
<tr>
<th>Strategic Effort</th>
<th>Why?</th>
<th>How Effective?</th>
</tr>
</thead>
</table>
Advancement or Enrollment Management - Strategic Efforts

<table>
<thead>
<tr>
<th>Strategic Effort</th>
<th>Why?</th>
<th>How Effective?</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

- By calendar year OR by event
- 5 minutes to complete this table
- Another 5 minutes to think strategically about the gaps you see
Hillbrook - Measuring Gaps in Strategic Efforts

- Start by analyzing our data
  - Year to year annual giving results
  - Dashboards
  - Surveys
  - Etc.

- What we’re doing already:
  - Does it reflect our school?
  - Is the purpose and communication clear?
  - Does the timing make sense?
  - Should we be doing it all?
Hillbrook - Gaps in Enrollment Strategic Efforts

- Things we realized we could be doing better:
  - WOM efforts
  - Retrospective vs. prospective efforts
  - Diversity & inclusivity efforts
  - Follow up efforts
  - Automation vs. personalization efforts
  - Retention efforts
  - Forecasting efforts
# Word of Mouth - Strategic Efforts

<table>
<thead>
<tr>
<th>Strategic Effort</th>
<th>Why/What/How?</th>
<th>How to Measure:</th>
</tr>
</thead>
</table>
| Targeted influencers within our community | ● Parent Ambassadors have access and knowledge  
● Families with local businesses have reach | ● Increased applications  
● Feedback from current families  
● Inquiry forms |
| Admissions related blog posts           | ● Asked current families to like, comment and share posts  
● We get to tell our story | ● Traffic on website and social  
● Increased applications  
● Feedback from current families  
● Inquiry forms |
| Handwritten thank you notes             | ● Think of a referral as a large gift to our school  
● Stewardship | ● Increased applications  
● Feedback from current families |
## Diversity, Equity and Inclusivity - Strategic Efforts

<table>
<thead>
<tr>
<th>Strategic Effort</th>
<th>Why/What/How?</th>
<th>How to Measure:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using research and data</td>
<td>● Diversity/Inclusivity Dashboard</td>
<td>● Enrollment stats</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Feedback from Board of Trustees Inclusivity Task Force</td>
</tr>
<tr>
<td></td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Create “Affording Hillbrook” brochure and web page</td>
<td>● Highlight during tours and Open Houses</td>
<td>● Flexible tuition applications</td>
</tr>
<tr>
<td></td>
<td>● Demonstrates commitment to economic diversity</td>
<td>● Feedback from applicants</td>
</tr>
<tr>
<td>Separate DEI table at Open House events</td>
<td>● Demonstrated commitment to DEI</td>
<td>● Enrollment stats</td>
</tr>
<tr>
<td></td>
<td>● Gives visibility to Director of DEI</td>
<td>● Feedback from applicants</td>
</tr>
</tbody>
</table>
# Strategic Enrollment Management Plan

## September

<table>
<thead>
<tr>
<th>Admissions/Enrollment</th>
<th>Recruitment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Retention</th>
<th>Marketing/Communication</th>
</tr>
</thead>
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</tbody>
</table>
Example of Enrollment Management Plan
Hillbrook - Gaps in Advancement Strategic Efforts

- Things we realized we could be doing better:
  - Outreach to new families
  - Utilization of class captains
  - Utilization of board members
  - Stewardship efforts
  - Retrospective vs. prospective efforts
  - Diversity & inclusivity efforts
  - Follow up efforts
  - Automation vs. personalization efforts
  - Forecasting efforts
## Outreach to new families - Strategic Efforts

<table>
<thead>
<tr>
<th>Strategic Effort</th>
<th>Why/What/How?</th>
<th>How to Measure:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Philanthropy at Hillbrook” evening event</td>
<td>● Educate families on culture and financial model</td>
<td>● Annual giving</td>
</tr>
<tr>
<td></td>
<td>● Earn the right for an ask</td>
<td>● Feedback from new families</td>
</tr>
<tr>
<td>Direct outreach by Head of School and Chief Advancement</td>
<td>● Personal touch</td>
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</tr>
<tr>
<td>and Enrollment Officer</td>
<td>● We get to tell our story</td>
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<tr>
<td></td>
<td>● Make people feel welcome</td>
<td></td>
</tr>
<tr>
<td>Stewardship plan</td>
<td>● Personal touch</td>
<td>● Annual giving</td>
</tr>
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<td></td>
<td>● Consistency</td>
<td>● Feedback from new families</td>
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<td></td>
<td>● Set up for the next gift</td>
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</tbody>
</table>
# Strategic Advancement Plan

## Annual Fund

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Goals</th>
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<tbody>
<tr>
<td>Key Performance Indicators</td>
<td>Strategies</td>
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</tbody>
</table>
Example of Advancement Plan

**Annual Fund**

**Objectives**
- To maintain a strong Annual Giving program through active recruitment of volunteers, better use of the Advancement Committee, the Board, and more targeted cultivation/stewardship of major donors.
- Evaluate donor pool to identify possible families to move to an ‘Annual Giving’
- Evaluate how we reach out to parents to secure yearly fundraising goals?
- To educate all constituencies about ways to give to Hillbrook and the importance of Annual Giving (e.g. new family approach and existing family engagement)

**Key performance indicators**
- Total budgeted goal -
- Parent goal - Continue to focus on bringing in new families at a ‘meaningful’ level and work on increasing returning parent giving
- Grandparent goal - Continue to grow the number and amount for Grandparent Giving
- Alumni goal - Increase the number and amount for Alumni Giving
- Parent participation, Faculty/Staff and Trustee participation

**Goal 1: Cultivate major donors to the Annual Fund throughout the year.**

**Strategies**
1. Continue with cultivation events to offer an opportunity to thank the leadership donors and the solicitors for their commitment to the Annual Fund as well as help them see the bigger picture—how the Annual Fund helps Hillbrook's operating budget meet its goal and student-centered impact experiences.
2. Revisiting the strategy for introducing new families to philanthropy at Hillbrook and make adjustments as necessary.
3. Work on better asks (increasing asks for major donors rolling off Capital Campaign and possibly add increased asks for those under $5,000 - haven't had ask amounts in those letters in the past)
4. Continue having the Head of School personally sign acknowledgement letters.
5. Continue handwritten thank you notes...add photos, other touch points, etc…???
6. Continue to identify potential grandparent donors (establish the Grandparents Club?).
7. Never stop thanking the donors and thank them often.
8. Develop ongoing touches for major donors from Mark or OAE (Keep Track of Touches).
10. How do we leverage the new Hub space to educate and excite donors? - start planning celebration event.
Example of Advancement Plan
Step 3 - Agree on and implement a Project Management Tool

- Helps to ensure collaborative execution of each strategic plan
- At Hillbrook we chose Trello
The Office of Advancement and Enrollment - Strategic Project Management
Please rate this session in the 2020 NAIS Annual Conference Mobile App. Go to the workshop listing, click on the Clipboard icon to the left of the event description to provide valuable feedback on the workshop. Thank you.