Kevin Plummer
Head of School
Tampa Preparatory School

Christina Dotchin
Director of Membership & Business Development
EMA
At The **Enrollment Management Association** we believe the admission practices of the **past** will not sustain the independent schools of the **future**.
Executive Summary
More than any other department, admission is tasked with closing the gap between the most promising aspects and the most dispiriting aspects of independent schools. This is a time of almost boundless innovation as many schools are enhancing the educational experience in a myriad of ways. Enrollment leaders have the privilege of communicating those advances to prospective parents. At the same time, independent schools have never faced more competition and the difference between average tuition and average income has never been greater. It’s the very same enrollment leaders that are challenged with facing those market factors every day.
Shifting Demographics
Changing Family Expectations
Shrinking Middle Class
Increased Competition
Globalization
Climate Change
Technology
Education Innovation
Politics
Your School
Who Responded?
765 Admission and Enrollment Professionals Responded
What Did We Find?
Gender Inequality Persists

Growing Uncertainty, Declining Optimism

Marketing Has Authority Without Action

Marketing Needs Better Focus

Retention - The Need for Strategy
Gender Inequality Persists
## School Size & Salary

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th></th>
<th>2019</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Under 500 students</td>
<td>Over 500 students</td>
<td>&gt;$100K</td>
<td>&lt;$100K</td>
</tr>
<tr>
<td>2019 Under 500 students</td>
<td>68%</td>
<td>32%</td>
<td>30%</td>
<td>70%</td>
</tr>
<tr>
<td>2019 Over 500 students</td>
<td>53%</td>
<td>47%</td>
<td>47%</td>
<td>53%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th></th>
<th>2016</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Under 500 students</td>
<td>Over 500 students</td>
<td>&gt;$100K</td>
<td>&lt;$100K</td>
</tr>
<tr>
<td>2016 Under 500 students</td>
<td>70%</td>
<td>30%</td>
<td>21%</td>
<td>79%</td>
</tr>
<tr>
<td>2016 Over 500 students</td>
<td>46%</td>
<td>54%</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>
Influence on Decision Making

2019

- Regularly Attend: 49% Male, 36% Female, 39% All Schools
- When Requested: 28% Male, 30% Female, 29% All Schools
- Provide Info: 18% Male, 27% Female, 25% All Schools
- No Involvement: 6% Male, 7% Female, 7% All Schools

2016

- Regularly Attend: 47% Male, 34% Female, 37% All Schools
- When Requested: 37% Male, 30% Female, 32% All Schools
- Provide Info: 12% Male, 28% Female, 24% All Schools
- No Involvement: 4% Male, 8% Female, 7% All Schools
Position Title

Dean/Assistant Head for Enrollment/Admission
- Female: 11%
- Male: 16%

Director of Admissions/Enrollment
- Female: 83%
- Male: 81%
Future Prospects

2019

HOS/ADMIN LDRSHP
- Male: 37%
- Female: 17%
- All Schools: 21%

ADMISSIONS
- Male: 45%
- Female: 56%
- All Schools: 53%

FACULTY/OTHER
- Male: 4%
- Female: 2%
- All Schools: 2%

DEPARTING IS
- Male: 7%
- Female: 11%
- All Schools: 10%

2016

HOS/ADMIN LDRSHP
- Male: 40%
- Female: 16%
- All Schools: 21%

ADMISSIONS
- Male: 44%
- Female: 60%
- All Schools: 56%

FACULTY/OTHER
- Male: 3%
- Female: 2%
- All Schools: 2%

DEPARTING IS
- Male: 4%
- Female: 9%
- All Schools: 8%
Growing Uncertainty, Declining Optimism
## Not Reaching Enrollment Goals

<table>
<thead>
<tr>
<th>Description</th>
<th>2019</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>We received many more applications than available spots and managed an extensive waiting list of students in most grades</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>We received more applications than available spots and managed a small waiting list of students in several grades</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td>We generally accepted all qualified students and reached our enrollment goals by the start of the year</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>We did not reach our enrollment goals until several weeks into the school year</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>We did not reach our enrollment goals last year</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>I do not know</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>
The Struggling Category

- Reached goals by start of year: 32% (2019), 27% (2016)
- Reached goals several weeks into year: 10% (2019), 7% (2016)
- Total Struggling: 42% (2019), 34% (2016)
Impact of Affordability

Based on your experience, to what extent is tuition a barrier to...

Getting students/families to apply to your school:
- To a great extent: 19%
- To a significant extent: 34%
- To some extent: 39%
- Barely: 6%
- Not at all: 1%

Getting students/families to enroll in your school:
- To a great extent: 18%
- To a significant extent: 32%
- To some extent: 41%
- Barely: 8%
- Not at all: 1%

Top two responses:
- 2019: 53%
- 2016: 47%

50% increase from previous years.

Arrows show difference of +/- 5 points from Previous Years.
Impact of Affordability

Almost 6-in-10 parents applied for financial aid.

45% Not affordable
26% Free options were of equal value
26% felt that free options were of equal value.

Of those families who were accepted to independent schools but will not attend, 45% of them stated it was not affordable.

Source: EMA’s Ride to Independent Schools Report
Consumer Price Index & Education

Price changes in consumer goods and services in the USA, 1997-2017

Price change in consumer goods and services in the USA, measured as the percentage change since 1997. Data is measured based on the reported consumer price index (CPI) for national average urban consumer prices.

- College tuition fees
- Education
- Childcare
- Medical care
- Household energy
- Housing
- Food & Beverages
- Public transportation
- New cars
- Clothing
- Software
- Toys
- TVs

Source: United States Bureau of Labor Statistics (BLS)

Credit to: John Gulla, EE Ford Foundation, NJAIS Shifting Sands Presentation, January 2018
What $9 million won't get you in Old Palo Alto: A house on a lot
Vacant property listed for sale after sitting undisturbed for decades
How Much Does a Family Have to Make to Afford an Independent Education in Washington, DC?

<table>
<thead>
<tr>
<th></th>
<th>FULL NEED</th>
<th>FULL PAY*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grades 1-12 Tuition $44,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 child</td>
<td>$107,092</td>
<td>$328,625</td>
</tr>
<tr>
<td>2 children</td>
<td>$107,092</td>
<td>$668,155</td>
</tr>
</tbody>
</table>

**SSS CRITERIA USED**

**COLA USED**
1.584 (District of Columbia)

*Full Pay Begins

**HOUSEHOLD INCOME**

$82,372  281k

MEDIAN HOUSEHOLD INCOME
± $2,651  ± 8,032

NUMBER OF HOUSEHOLDS

In 2017, the median household income of the 281k households in Washington, DC grew to $82,372 from the previous year’s value of $75,506.
Enrollment & Revenue Goals

54%: Met both enrollment and net tuition revenue goals
11%: Met enrollment goal, but not net tuition revenue goal
10%: Met net tuition revenue goal, but not enrollment goal
18%: Met neither enrollment or net tuition revenue goal
7%: Do not know
Decreasing Optimism

How would you describe prospects for enrollment growth at your school over the next five years?

- Excellent: 10% (2019), 13% (2016)
- Very Good: 29% (2019), 36% (2016)
- Good: 32% (2019), 32% (2016)
- Fair: 24% (2019), 17% (2016)
- Poor: 5% (2019), 3% (2016)
Uncertainty Prevails

How would you describe prospects for enrollment growth at your school over the next five years?

<table>
<thead>
<tr>
<th>Met both enrollment and net tuition revenue goals</th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>14%</td>
<td>33%</td>
<td>30%</td>
<td>21%</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Met enrollment goal but not net tuition revenue goals</th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2%</td>
<td>19%</td>
<td>41%</td>
<td>30%</td>
<td>7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Met net tuition revenue goal but not enrollment goal</th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7%</td>
<td>28%</td>
<td>34%</td>
<td>30%</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Met neither enrollment or net tuition revenue goals</th>
<th>Excellent</th>
<th>Very Good</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4%</td>
<td>22%</td>
<td>32%</td>
<td>32%</td>
<td>10%</td>
</tr>
</tbody>
</table>
Uncertainty Prevails

How would you describe prospects for enrollment growth at your school over the next five years?

- **Excellent**: 7% seeking to increase enrollment, 13% seeking to maintain enrollment
- **Very good**: 32% seeking to increase enrollment, 25% seeking to maintain enrollment
- **Good**: 34% seeking to increase enrollment, 31% seeking to maintain enrollment
- **Fair**: 23% seeking to increase enrollment, 27% seeking to maintain enrollment
- **Poor**: 4% seeking to increase enrollment, 4% seeking to maintain enrollment
Marketing Has Authority Without Action
Marketing Directors are the Norm

Does your school have a dedicated director of marketing/communications?

75%  74%
2019  2016
Admission Marketing

To what degree do marketing directors have responsibility for admission marketing?

![Graph showing data for 2019 and 2016.](image)

- **2019**
  - To an extremely large extent: 37%
  - To a large extent: 33%
  - To some extent: 23%
  - To a very small extent: 1%
  - To no extent at all: 1%

- **2016**
  - To an extremely large extent: 34%
  - To a large extent: 32%
  - To some extent: 8%
  - To a very small extent: 1%
  - To no extent at all: 24%
Admissions is the Breadwinner

Net tuition accounts for 78% of school revenue

- $21,528
  Median Net Tuition Income per Student
- $27,545
  Median Total Income per Student
Responsibility ≠ Attention

What percentage of the school’s marketing professional/team’s time is spent on admission marketing?

- 2% (0-9%)
- 8% (10-19%)
- 14% (20-29%)
- 17% (30-39%)
- 8% (40-49%)
- 16% (50-59%)
- 6% (60-69%)
- 10% (70-79%)
- 5% (80-89%)
- 2% (90-100%)
Marketing Needs
Better Focus
Rated Features & Benefits

- Development of the whole child: 46%
  - Ranked 1: 17%
  - Ranked 2: 15%
  - Ranked 3: 14%
  - Not Ranked: 54%

- Academic rigor: 30%
  - Ranked 1: 13%
  - Ranked 2: 10%
  - Ranked 3: 7%
  - Not Ranked: 70%

- Small class size: 30%
  - Ranked 1: 9%
  - Ranked 2: 10%
  - Ranked 3: 11%
  - Not Ranked: 70%

- Character development: 30%
  - Ranked 1: 6%
  - Ranked 2: 10%
  - Ranked 3: 13%
  - Not Ranked: 70%

- Personalized attention: 29%
  - Ranked 1: 10%
  - Ranked 2: 9%
  - Ranked 3: 10%
  - Not Ranked: 71%

- Quality of the faculty: 25%
  - Ranked 1: 6%
  - Ranked 2: 9%
  - Ranked 3: 9%
  - Not Ranked: 75%

- Experiential learning: 18%
  - Ranked 1: 5%
  - Ranked 2: 7%
  - Ranked 3: 5%
  - Not Ranked: 82%

- Critical thinking skills development: 18%
  - Ranked 1: 4%
  - Ranked 2: 7%
  - Ranked 3: 7%
  - Not Ranked: 82%
Rated Features & Benefits

- College placement: 2% ranked 1, 4% ranked 2, 7% ranked 3, 86% not ranked
- Personalized learning program: 6% ranked 1, 4% ranked 2, 3% ranked 3, 68% not ranked
- 21st century skills: 4% ranked 1, 4% ranked 2, 4% ranked 3, 88% not ranked
- Specific academic program (such as IB or AP): 6% ranked 1, 3% ranked 2, 2% ranked 3, 89% not ranked
- Spiritual development: 5% ranked 1, 4% ranked 2, 2% ranked 3, 89% not ranked
- Project-based learning: 2% ranked 1, 4% ranked 2, 4% ranked 3, 90% not ranked
- Learning differences: 3% ranked 1, 1% ranked 2, 1% ranked 3, 95% not ranked

Ranked 1 | Ranked 2 | Ranked 3 | Not Ranked
What Do Parents Want?

<table>
<thead>
<tr>
<th>What Parents Want</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide an education that will challenge your child</td>
<td>97%</td>
</tr>
<tr>
<td>Develop and/or maintain a love of learning in your child</td>
<td>97%</td>
</tr>
<tr>
<td>Provide individual attention</td>
<td>82%</td>
</tr>
<tr>
<td>Gives superior college/university placement</td>
<td>77%</td>
</tr>
<tr>
<td>Develop a strong moral character</td>
<td>92%</td>
</tr>
<tr>
<td>Support social and emotional development</td>
<td>89%</td>
</tr>
</tbody>
</table>
## A Troubling Comparison

<table>
<thead>
<tr>
<th>RIDDE Characteristic Chosen by Parents</th>
<th>% Rank 1st</th>
<th>Feature/Benefit Reported in SOTI</th>
<th>% in Top 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education that will challenge your child</td>
<td>97%</td>
<td>Academic Rigor</td>
<td>30%</td>
</tr>
<tr>
<td>Love of learning in your child</td>
<td>97%</td>
<td>Development of whole child</td>
<td>46%</td>
</tr>
<tr>
<td>Strong moral character</td>
<td>92%</td>
<td>Character development</td>
<td>30%</td>
</tr>
<tr>
<td>Social and emotional development</td>
<td>89%</td>
<td>Development of whole child</td>
<td>46%</td>
</tr>
<tr>
<td>Individual attention</td>
<td>82%</td>
<td>Personalized attention</td>
<td>30%</td>
</tr>
<tr>
<td>College/university placement</td>
<td>77%</td>
<td>College placement</td>
<td>14%</td>
</tr>
</tbody>
</table>
Retention - The Need for Strategy
Attrition on the Increase

To what degree, if any, have you seen an increase in voluntary attrition at your school over the past 3-5 years?
Attrition on the Increase

To what degree, if any, have you seen an increase in non-voluntary attrition at your school over the past 3-5 years?

<table>
<thead>
<tr>
<th>Degree of Increase</th>
<th>2016</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>To a great extent</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>To a significant extent</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>To some extent</td>
<td>22%</td>
<td>27%</td>
</tr>
<tr>
<td>Barely</td>
<td>49%</td>
<td>40%</td>
</tr>
<tr>
<td>Not at all</td>
<td>26%</td>
<td>27%</td>
</tr>
</tbody>
</table>
Retention Committees Declining

25% 2019

30% 2016
Strategic Approaches

Does your school have specific retention efforts / plans related to any of the following student groups?

- **Specific grade levels**
  - Yes: 53%
  - No: 47%

- **Students of color**
  - Yes: 17%
  - No: 83%

- **Students receiving financial aid**
  - Yes: 16%
  - No: 84%

- **Students not receiving aid**
  - Yes: 14%
  - No: 86%

- **Domestic students**
  - Yes: 14%
  - No: 86%

- **International students**
  - Yes: 9%
  - No: 91%

- **Boarding students**
  - Yes: 8%
  - No: 92%
# Impact of Retention Committees

Does your school have specific retention efforts/plans related to any of the following student groups?

<table>
<thead>
<tr>
<th></th>
<th>Have retention committee</th>
<th>No retention committee</th>
<th>All Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific grade levels</td>
<td>76%</td>
<td>45%</td>
<td>47%</td>
</tr>
<tr>
<td>Students of color</td>
<td>23%</td>
<td>14%</td>
<td>83%</td>
</tr>
<tr>
<td>Students receiving financial aid</td>
<td>23%</td>
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</tr>
<tr>
<td>Domestic students</td>
<td>27%</td>
<td>9%</td>
<td>86%</td>
</tr>
<tr>
<td>International students</td>
<td>15%</td>
<td>6%</td>
<td>91%</td>
</tr>
<tr>
<td>Boarding students</td>
<td>16%</td>
<td>6%</td>
<td>92%</td>
</tr>
</tbody>
</table>
Gender Inequality Persists

Growing Uncertainty, Declining Optimism

Marketing Has Authority Without Action

Marketing Needs Better Focus

Retention - The Need for Strategy
What does it mean for you?

- How can you be more optimistic about enrollment prospects?
- Advocate for gender equality
- Build bridges between admission and marketing
- Share intelligence and expectations
- Review and hone marketing messaging
- Conduct or consult research
- Develop a strategic retention plan
- Develop a retention marketing plan
Taking the Lead

Barbara Eghan,
Director of Enrollment Management,
Georgetown Day School, DC

Georgetown Day School (DC), has re-imagined the work of enrollment. Barbara is director of enrollment management and financial aid, and oversees directors at the lower, middle, and high school levels, ensuring alignment of admission goals and practices. Much of her time is focused externally – building relationships, researching the market, and planning strategy. Barbara ensures that school-wide data is used in all student engagements– from the admission assessment process to student graduation.
Proctor Academy (NH) knows its strengths and plays to them. A small school that can serve students with different learning styles, the school is clear in its marketing and outreach process about its mission and its value. Based on a well honed and intentional digital plan, Scott has created a successful family nurture process, to ensure that enrollment goals are well met. Based on data that he gathers when families initially navigate the Proctor website, he can continue to “serve” them stories that will be of interest. Also, by tracking the activity of his website, Scott is able to inform Proctor’s annual marketing plan for enrollment and build predictive models for prospective student yield.
Changing the Financial Aid Conversation

Linda Dennison,
Deputy Head, CFO
Indian Creek School, MD

Indian Creek School (MD) recently launched a Flexible Tuition Program in spring 2018, hoping to make the process of paying for school (and receiving discounts) easier and more transparent. In short order, this project has resulted in 5% enrollment growth and a larger applicant pool. Families appreciate the clarity around cost and the easier admission and financial aid process. The school is pleased that their transparency with costs and tuition, is being supported.
At Princeton Academy of the Sacred Heart (NJ), a head transition resulted in significant student attrition. New head of school Rik Dugan needed to better understand and connect with families to hear their concerns; during his first year he listened carefully to family issues and met with all families who had departed, to better understand their complaints to hear complaints. As part of his management, Rik founded an internal retention committee focused on the “family and boy” experience. The committee continues, to this day, to work on improved communications, and to personally connect with the 190 enrolled boys and their families. Rik personally greets every student each morning as they enter the building— one piece of the action plan to ensure that families feel valued and children feel welcome.
Full report available at enrollment.org
Join the conversation.

Inspire your next big idea. Get questions answered. Build authentic relationships. Learn from industry experts.

Welcome to EMA's online member community.

FEATURED MEMBER

Christian Donovan

Director of Enrollment Management & Strategic Research

Head-Royce School: Oakland, CA

Christian is a big EMA supporter having served on the former Digital Assessments Working Group and currently serving on the Admission Leadership Council and as a Future Leaders cohort leader.

Connect with Christian →
Thank you! Questions?