

PEJE

Partnership for
Excellence in
Jewish
Education

TOWARD A PROACTIVE, COMPREHENSIVE ADMISSION PROGRAM:

*What Every Head of School
Should Know About
Supervising the
Admission Director*

By Rheua S. Stakely

תורים אלו מלמדי
חיינקות באמונה
חרוזים אלו החיינקות

*Teachers and school children —
precious jewels of our community*
MIDRASH RABBAH, SONG OF SONGS

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FOREWORD

Dear Head of School:

We at the Partnership for Excellence in Jewish Education are delighted to offer the day school world this new publication about admission—from recruitment to enrollment and attrition prevention. Not only is this topic critical for day school success, but it also reflects the core mission of PEJE as we move forward into our next phase of development. Because day schools have demonstrated so consistently their positive impact on creating a more active, committed, and literate Jewish community, we at PEJE are devoting much of our attention to strategies that will help attract and retain the largest number of students possible.

The publication is structured in a way that makes it accessible to and easily used by a busy Head of School who needs tools to facilitate the supervision of the Admission Director, one of the key players in any successful Jewish day school. As a former Head of School, I know that I would have benefited greatly from a document such as this when I was seeking to professionalize admission.

Finally, PEJE is deeply committed to utilizing and disseminating the expertise that exists within individuals across the country. Rheua Stakely, author of this publication, is a prominent expert on independent school admission, including recruitment and attrition prevention, as well as the administration of financial aid programs. We have a relationship with Rheua that goes back a number of years. After working in admission and financial aid at Phillips Exeter Academy for 12 years, she formed her own consulting company. Over the past 18 years she has worked with more than 150 schools coast to coast. In addition, over the last 8 years she has developed considerable expertise in the specifics of Jewish day school operations. We are thrilled to be able to make her expertise available to you, and we hope that this publication is reaching you at a time when you can immediately put it to good use. As always, we welcome your feedback, and we wish you every success, not only in your admission efforts, but in all the very significant and wonderful work you are doing in leading your institution.

Sincerely,

Rabbi Joshua Elkin, Ed.D.

Executive Director

PREFACE

As I travel around the country working with Jewish day schools, several themes keep recurring. Enrollment is low. In some schools, low enrollment is due to lackluster, disjointed, or non-existent recruitment efforts. In other schools, it is a combination of desultory recruitment efforts and high attrition. In most of these cases there is no Admission Director. Or the person responsible for admission has several other jobs, too. Or recruitment is in the hands of a Board committee.

All too often, I hear stories of what I call the "shotgun approach" to recruitment and the rest of admission. A well-intentioned parent or Board member hears about a "great idea" another school tried and convinces the school to hold the same event. Time and money are spent, but it flops—very few show up at the event or no one completes an application after attending. Not to be deterred, another person comes up with an "even better idea" and off people go to make the new idea happen. And on it goes. Because the shotgun approach is often conducted with a sense of urgency in response to a perceived problem, events are usually pulled off in the heat of the moment—that is, they are not planned in context with other admission activities. This handbook offers another way: an admission process carefully coordinated through a proactive, comprehensive plan.

Tuition is by far the largest source of revenue in Jewish day schools. Yet many schools continue to approach the myriad details involved in attracting, enrolling, and keeping students—and their tuitions—in an ad hoc, fragmented, or reactive way. This publication is meant to change that and thereby improve the enrollment picture in Jewish day schools.

From my perspective of thirty-plus years in admission, improving the enrollment picture begins with hiring a part-time or full-time paid professional who focuses exclusively on admission and is trained in the art and science of "thinking admission" in a Jewish day school. Without one person to coordinate all that is involved in admission, enrollment will probably always be a challenge.

PEJE is dedicated to helping all schools, including start-ups and "mom-and-pop" operations, transition to more professional, well-managed organizations. Professionalizing the admission program is one step along the road to a healthy school. Schools that thrive follow the concepts and components presented here. If some of them seem overwhelming at first, do not fear. They are do-able, one step at a time. As they say, go slow to go fast.

It is my hope that the following pages will provide the Head of School with a valuable tool for supervising the Admission Director and ensuring a Proactive, Comprehensive Admission Program for years to come.

May your enrollment be high and your attrition low!

Rheua S. Stakely
Consultant and Trainer

ACKNOWLEDGMENTS

Without the remarkable vision and support of Josh Elkin, and without the encouragement, insight, and patience of Naava Frank, this publication would never have come about. I offer my sincerest thanks to each of them.

"Thank you" to Pat Cox, my editor extraordinaire, does not begin to convey how grateful I am for her efforts. Pat came in at the eleventh hour and worked her magic by bringing order where there was chaos. Her intellect, clarity, care, and wit were a priceless gift to this project.

My thanks also go to others working on staff or in consultation with PEJE: Tamara Ambar collated comments and suggestions from many sources. Suzanne Kling offered cogent suggestions and was indefatigable at keeping us focused while coordinating the details of publishing. Cheryl Finkel and Sara Simon were among others who made invaluable contributions at various stages of the project.

I am grateful to the following educators who contributed their time and perspective to drafts of this handbook: Rivka Ben-Daniel (Abraham Joshua Heschel Day School West), Jane Cohen (South Area Solomon Schechter Day School), Judy Einbund (Abraham Joshua Heschel Day School West), Amy Farber (Cohen Hillel Academy), Carl Mandell (Solomon Schechter Day School of Greater Hartford), Marylou Marcus (Dublin Academy), Jan Saltsman (Abraham Joshua Heschel Day School West), Penny Stein (Alperin Schechter Day School), and Bob Tornberg (Cohen Hillel Academy).



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SECTION I

KEY CONCEPTS: Read This Section Before Getting Started

"But we don't have money in the budget to hire an Admission Director ..."

The words above are usually the first response I hear when I work with Heads of Jewish day schools and advocate hiring an Admission Director as part of a Proactive, Comprehensive Admission Program. At this point I stop and make the case for hiring an Admission Director. The bottom line, so to speak, is that for most Jewish day schools, tuition is the largest source of revenue. So the short answer to why schools need an Admission Director is that something as vital to the survival of a school as the recruitment of students should not be left to chance, volunteers, or merely making do. Without a qualified, trained Admission Director, enrollment will continue to be a challenge.

If you do not have an Admission Director, hiring one is a big step. You are likely to have to convince a skeptical Board about the why and how of this move. This handbook will help you, the Head of School, to make the case to secure funding for the position. Until you add an Admission Director this publication can help you supervise other school personnel who carry out admission activities.

If you have an Admission Director in place, then you may be thinking, "Now what?" This publication is also written with you in mind. Drawing on my years of experience, I have designed it to answer the question, "What does a Head of School need to know about a professional admission program in order to supervise the Admission Director well?" And to make supervising easier, the handbook defines what proactive, comprehensive admission means and lays out all the components of a well-functioning admission program.

To get off to a good start in supervising admission work using this handbook, it is important to first understand a few of the terms and assumptions used here. They are explained in the Key Concepts that follow. There is also a Glossary at the back of the handbook.

KEY CONCEPT ONE: "ADMISSION"—ONE WORD SAYS IT ALL

The term "admission" encompasses recruitment, enrollment, marketing, and attrition prevention. In the greater world of independent schools and colleges, the term "admission" includes all of the above and more. In my work with Jewish day schools, I hear some schools say, "All we need help on is recruitment—we're fine with admission." Others claim, "Our problem is attrition." Or, "We just need tips about marketing." Often different people set out to patch up pieces of the admission picture in a well-meaning, but disjointed, disconnected way. Under the umbrella term "admission," all the details involved in recruiting, enrolling, and keeping students through graduation make up a Proactive, Comprehensive Admission Program and are addressed in this handbook.

KEY CONCEPT TWO: THE ADMISSION DIRECTOR IS ESSENTIAL

One professional should be in charge of admission. This handbook advocates that schools have a paid, full-time or part-time, person who focuses exclusively on coordinating all the admission components. Further, this handbook advocates that the person receive training from a qualified source to become proficient and professional in "thinking admission" in a Jewish day school, from recruiting prospects to nurturing them as applicants through the rest of the admission process and on to their first day as students.

KEY CONCEPT THREE: MAKING THE CASE TO SECURE FUNDING FOR AN ADMISSION DIRECTOR

For many people, including Boards, hiring and training an Admission Director may be a totally new idea. Therefore, you may need to make the case to your Board for an Admission Director in order to secure funding for the position and for training.

Making the Case

Following are a few of the main points in the argument for an Admission Director. Of course, make certain the Board understands the other Key Concepts as well.

Maximize your main source of revenue by design, not by chance. As indicated above, tuition is by far the largest source of revenue in Jewish day schools. Therefore, it makes good business sense to have a paid professional who focuses on nothing but making those "sales" come in. The position of Admission Director is much too important to have it coordinated by a volunteer. The Admission Director must be a trained professional.

A professional admission process signals quality to parents from the start. Without a focused, trained Admission Director, an admission process can lack organization, look confused, lack responsiveness and follow-through, and contribute to low enrollment. A professional admission process indicates to parents from their first contact that the school is a credible organization, one they can trust.

Constant focus on prospects and applicants — those people not yet part of the school community — is paramount to increasing enrollment/revenue. There are compelling reasons why the Head of School should not be the coordinator of admission. The Head of School, other administrators, and faculty are busy with students, parents, colleagues, and curriculum: in other words, their daily focus is on the school's "insiders." In contrast, the Admission Director needs to focus daily on the "outsiders," the people who aren't yet in the school: what is on their minds, what are their needs, what language/message speaks to them. If enrollment is to be successful over the long term, it is important to have a professional to focus solely on "outsiders" and "thinking admission."

When admission is an administrative function, the Board is free to govern. Admission is a day-to-day operation and as such the person coordinating admission should be hired by and report to the Head of School. A Board member should not fill this position because the Head works for the Board, not the other way around. Not only does having a Board member as a staff member muddle organizational roles, sending a wrong message to both insiders and outsiders, but it reduces the time that the Board has to focus on governance. (See Key Concept Four for more on this topic.)

How to Fund the Position of Admission Director

The Head of School should encourage the Board to build into the budget a salary for the position of Admission Director, as well as funds for training by a qualified source in "thinking admission" in a Jewish day school. The position of Admission Director more than pays for itself: four or five new students = one Admission Director's salary.

If a school wishes to hire an Admission Director immediately and the budget does not yet include a salary for the position, it is still possible to proceed. Several schools have found one or more donors willing to give a one-time gift that funded the position for one year until the salary could be built into the budget. It is not unusual to find people in the parent body and/or the larger Jewish community who would be interested in helping out in this way.

KEY CONCEPT FOUR: THE BOARD'S REAL ROLE IN ADMISSION

The Board, through its governance, has several roles to play in keeping enrollment healthy and one of them is not doing admission. The Board's most important ongoing governance task regarding admission is to set tuition for the next year in a timely manner. This means meeting two deadlines: 1) The Board should begin discussion of the tuition increase for the next year in October or November. 2) By December or January at the latest, the Board should set tuition for the next school year. Proactive planning by the Board ensures that all newly admitted students, both those paying full tuition and those receiving financial aid, receive contracts with a specified tuition amount no later than March. Timely contract turnaround is an indicator that a school is professionalizing its fiscal management.

Overall, the role of the Board is to think about the future, to ensure that the school is around in 50 years, to set broad, general policy—macro matters. The role of the staff is day-to-day management, to run school life today—micro matters. In other words, since admission activities are day-to-day operations, the board should refrain from doing admission work by leaving it in the hands of a school professional.

Therefore, if the Head of School has hired an Admission Director, there is no need for a recruitment committee of the Board. Even if there is no Admission Director yet, the Head of School or a staff person should coordinate the admission effort. If a school is to mature and have healthy enrollment over time, the Board and staff must be clear on which tasks are appropriate for which body of people, Board or staff. As stated before, PEJE is dedicated to helping schools transition from start-up or "mom-and-pop" operations to professional, well-managed organizations. Leaving admission coordination to the trained Admission Director with the Head as supervisor is another step in professionalizing the institution.

Here are some recommendations you can share with the Board about ways they can support admission.

Ways the Board Can Support Admission

1. Set tuition annually in a timely manner. Begin discussion of tuition in early Fall and decide by December.
2. Encourage the Head of School to hire an Admission Director, full-time or part-time, whose sole focus is to manage recruitment and admission. Fully fund the position.
3. Fund the Admission Director's initial training and ongoing professional development. Encourage the Head of School to locate appropriate training in "thinking admission" in an independent school, specifically a Jewish day school.
4. To ensure that admission can be successful, make certain you have excellence in all areas: faculty, programs, facilities, etc. Weaknesses in any of these areas can make enrollment an uphill struggle for even the very best of Admission Directors. By doing its part to fund the overall excellence of the school, the Board helps admission, including recruitment and attrition prevention.
5. Locate demographic trend data about the Jewish population in your area:
 - a) use the data in planning for the future of the school overall.
 - b) pass the data on to the Head of School and the Admission Director.
6. Increase the endowment. Engage in proactive, comprehensive development work rather than ad hoc fund-raising events. Expect "rainy days," bad financial times, unemployment, and low enrollment. Plan for them.
7. Create new sources of revenue beyond tuition so that "all your eggs are not in one basket."
8. Use the school's Issue Response Protocol for Board Members, which outlines appropriate ways for Board members to respond when parents or faculty bring an issue to one of them. By redirecting individuals politely yet immediately to the appropriate school professional—not listening to or trying to solve day-to-day management issues—the Board can go a long way toward decreasing frustration and ultimately, attrition.
9. Remember that in all conversations, Board members must use the appropriate tone, i.e., warm, genuine, and positive. Positive tone should not be a matter of choice: it should be a condition of being on the Board. Find a constructive way to talk about difficult issues in Board meetings, at soccer practice, and in the grocery checkout line. Board members are "Admission Ambassadors" for the school at all times and in all places. The Board should remind itself periodically of the importance of being positive Ambassadors.

KEY CONCEPT FIVE: THE HEAD'S MANY ROLES IN ADMISSION

As chief administrator, the Head of School has many roles critical to keeping enrollment healthy: striving for excellence in every aspect of school life, overseeing the multifaceted "marketing" of the school and, of course, supervising the Admission Director.

Striving for Excellence

Just as it is important for the Board to do everything possible to make certain there is excellence in all areas of school life, the Head of School should also strive for top quality faculty, programs, and facilities. Otherwise, even a superb Admission Director will struggle to maintain the desired enrollment. Vigilance from the Head of School in improving the overall excellence in the school will in turn help all phases of admission from recruitment to attrition prevention.

Overseeing Marketing Efforts

It is important for the Head to understand the different kinds of marketing that a school needs to pursue, which are for the Head to undertake and which fall to other school professionals, including the Admission Director. Generally speaking, marketing in schools has four distinct purposes and audiences:

Purpose	Audience
1. increase new student enrollment	1. people with school age children
2. expand general name recognition	2. anyone in the community, with or without school age children
3. raise funds	3. current donors and others with money
4. improve communication	4. current families and alumni/ae

This handbook focuses only on the first purpose. But what happens in activities focused on the other purposes has an impact on admission, so the Head's role in planning and coordination is key. While you, as Head, are responsible for making certain all of these kinds of marketing take place, the Admission Director should focus exclusively on #1. (See Components Six and Seven.) As you engage in activities having to do with #2, take care to coordinate with admission events and outreach. In fact, when the Head is out in the community sharing excitement about what is happening in the school, when the Head invites "outsiders" such as rabbis and community leaders in to participate in school events, and when the Head visits "feeder" organizations to meet with colleagues in advance of the Admission Director's visit, the Head is going a long way to building and establishing the strong relationships that will serve the school well in all areas, especially admission.

Supervising the Admission Director

Because the Head of School is so vital to the success of admission, this entire handbook is devoted to the subject of the Head's supervisory role in admission. In that domain, the Head of School has many tasks: making the case to hire an Admission Director, hiring the right person for the job, supporting that person in weekly meetings and with other constituencies, joining in Enrollment Team activities, overseeing attrition prevention, and ensuring coordination among school personnel whose work connects with admission.

To supervise the Admission Director, the Head of School does not need to know how to "do" admission work. But the Head does need to know what it means to be proactive and comprehensive in admission. And the Head needs to know what the essential components are and be reassured that they are happening in a timely, user-friendly manner.

Usually the first step in supervising is to write a job description that outlines the duties of the Admission Director, including whether the job is part-time or full-time and what that means in terms of actual time commitment. Supervision includes clarifying the job description so that both parties know what is expected.

To supervise well there must be a partnership between the Head and Admission Director with open communication and mutual respect. Open communication and respect come about over time as the Head meets regularly with the Admission Director, learns of efforts to improve the enrollment picture, and shows support for the Admission Director's efforts during those meetings and with the larger school community. Supervising well includes setting clear expectations and giving feedback around demeanor, admission goals, and progress on specific components of the admission program.

KEY CONCEPT SIX: VIEWING ADMISSION AS A PROACTIVE, COMPREHENSIVE PROGRAM

It's important to get clear on what the "it" of professional admission work includes. Once the Admission Director is on board and professionally trained, that person can begin to transform admission with your support. You, the Admission Director, and others in the school should make sure you share the same conception of what your school is trying to achieve in admission—what's involved in a Proactive, Comprehensive Program.

Simply put, being proactive in admission means that the Admission Director and the school take the initiative, not waiting for people to come to you. It means acting purposefully and professionally, not being passive or reactive. To reach out, to seek the appropriate applicants, to help them and their families through the process, and to carefully nurture them through to enrolling and on to graduating, takes much planning, energy, organization, and follow-through on the part of the Admission Director. For example, when calendars and systems are in place to anticipate the next step, that is evidence the Admission Director is being proactive.

Comprehensive means dealing as part of a whole with all the relevant tasks and their myriad details: recruiting, keeping procedures on track, using carefully selected and trained volunteers, producing appropriate print materials, making informed decisions, and so on. A comprehensive admission program is one that includes all the relevant parts, in the right order, done in a professional manner, at the right time, and coordinated by one person—the Admission Director. It is actually easier to be proactive and comprehensive when one person is responsible from beginning to end of an applicant's contact with the school.

A truly Proactive, Comprehensive Admission Program has many components: four core components for a strong foundation and several other important ones that can be implemented over

time. The first four components are the basics, the essentials. The remaining nine components can be gradually addressed and phased in carefully over time. The Components of a Proactive, Comprehensive Admission Program are:

Core Components

1. The Admission Director
2. Acceptance Criteria
3. Internal Admission Calendar
4. Schedule and Checklist for Applicants

Other Important Components

5. Critical Points in the Admission Process
6. Outreach Using People
7. Outreach Using Print and Electronic Materials
8. Tools for Assessing a Good Match: From the Application Packet to a Completed Application File
9. Payment Plans, Financing Options, and Financial Aid as Marketing Tools
10. Statistics and Reports
11. Attrition Prevention
12. The Admission Notebook and Computer Records: The Whole of Admission in One Place
13. The Retreat: Celebrate and Plan the Next Year

You will find Components One to Four in Section II. Section III takes up Components Five to Eleven. And Section IV addresses Components Twelve and Thirteen.

SECTION II

SUPERVISING THE ADMISSION DIRECTOR: The Core Components

"You can, and should, shape your own future because if you don't, somebody else will."

Implementing a Proactive, Comprehensive Admission Program is a big undertaking and at times can seem a bit daunting to supervise. This handbook assumes that professionalizing the admission enterprise is a "work in progress," implemented and refined over time. It invites you to reflect periodically on your school's practice with an eye toward next steps. If you are just starting out with an Admission Director, it may take a couple of years to put in place all the parts of a professional admission program described in this handbook. Take one component at a time. If you or your Admission Director feel overwhelmed at any point, stop, step back, and review. Then, pick one new topic to work on together. There are many details involved in a Proactive, Comprehensive Admission Program, and it takes time to do them all and do them well.

The components of Section II are the core ingredients of a proactive admission program. Start with these four components that are very do-able. With an Admission Director, Acceptance Criteria, Internal Admission Calendars, and Applicant Schedule and Checklist, any admission program has a solid foundation. If you already have an Admission Director, start with Component One anyway as it may offer refinements to your current working relationship.

COMPONENT ONE: THE ADMISSION DIRECTOR

RECOMMENDATIONS:

1. Hire a paid, part-time or full-time, Admission Director, someone whose sole focus is to "think admission." Hire a person with the right personal qualities for this critical position.
2. Provide the Admission Director with training by a qualified source in "thinking admission" in a Jewish day school. Provide funds for yearly professional development for admission.
3. Use weekly meetings to support and supervise the Admission Director. Refer to this handbook to stay on track and to monitor progress.

RATIONALE:

The right personality for the job of admission is something that cannot be learned: it is a gift. Skills for the job can be learned, but it is the right personal qualities—warm, welcoming, personable, organized, self-starting, and discreet—that are critical. The Admission Director sets the tone for the school in the eyes of the public. A family's first impression of the school is usually the Admission Director, and in many ways the Admission Director is the school in an applicant's eyes. Choose the Admission Director wisely.

Proactive admission work is part science and part art, part systems and part heart and soul. This handbook addresses the science, the systems. However, science and systems are no substitute for the art and heart of admission work: the thoughtful, gracious, energetic, and organized Admission Director. The science can be learned with a good trainer. The art is a gift, those un-teachable personal qualities that the right Admission Director brings to the job. Again, carefully select the Admission Director.

Even the most charismatic of characters cannot be successful without the right training. For example, experience in marketing and sales is not adequate preparation for "thinking admission" in a Jewish day school. No matter what the person's other expertise, training in independent school "admission thinking" is essential.

Whether the Admission Director is full-time or part-time depends on the size of the school and the scope of the job. In a small school or a school just beginning to professionalize its admission program, two-thirds to three-quarter time may be sufficient. Larger schools or rapidly growing schools might want to start with a full-time person.

Ongoing professional development is also critical to a successful admission operation. Annual trainings and conferences allow for networking with colleagues and ensure that the latest information about proactive admission work will become part of the school's admission program. Engaging in such yearly professional development activities means that the Admission Director does not have to "reinvent the wheel." At the same time, the Admission Director has an opportunity to be an ambassador for the school among peers.

Weekly meetings with the Admission Director are a great way to keep efforts on track and minimize surprises. These meetings are also a good place to discuss the meaning of enrollment statistics, monitor

progress, and decide how best to share good news. By meeting regularly you help the Admission Director be proactive.

COMPONENT TWO: ACCEPTANCE CRITERIA

RECOMMENDATIONS:

1. **Work with the Admission Director and others to specify and write down Acceptance Criteria.**
2. **Be guided by your mission as well as your current faculty and programs in establishing Acceptance Criteria.**
3. **Request evidence from the Admission Director that Acceptance Criteria are used in all aspects of the admission program.**

RATIONALE:

Acceptance Criteria are the second ingredient in a successful admission program. Without Acceptance Criteria, nothing else can proceed. Acceptance Criteria tell the Admission Director for whom to look and encourage to apply, and which applicants to admit. The Admission Director, Head of School, and other selected faculty and administrators are among the appropriate people to discuss and establish Acceptance Criteria.

Drawing on the school's mission statement, the group specifies Acceptance Criteria for use in the admission process. Among the considerations are the following: Given your mission, who are the students your school can best serve? If your school begins at middle school or high school, given your programs and services and your faculty for the coming year, describe in detail the range of academic ability, maturity, personality characteristics, and talents of the students you are prepared to teach and care for in a truly professional way. If your school begins at pre-school or elementary school, given your programs and services and your faculty for the coming year, describe in detail the range of cognitive and social abilities/disabilities, and other developmental levels of the students you are prepared to teach and care for in a truly professional way. For all levels of schooling, be certain also to describe those for whom you are not the best match at this time, given your current faculty and programs. At the end of your deliberation, you will have three lists—one describing those you can serve, another describing those you cannot serve at this time, and a third describing those you might admit in small numbers or with conditions attached such as requiring summer school or a tutor for the year. Used in combination, these three lists form your Acceptance Criteria.

Discussing, writing down, and applying Acceptance Criteria throughout the admission process can greatly improve the enrollment picture. Admitting only students for whom you have qualified professional staff and programs can prevent attrition. Conversely, admitting students for whom you do not have qualified professional faculty and programs can lead to high attrition. Attrition is a vicious circle: it leads to low morale in the school and can hurt recruitment efforts. Therefore, it is very important to be explicit about Acceptance Criteria and stick with them.

A school whose mission is to provide a Jewish education for every Jewish child needs specific programs and a faculty professionally trained to handle diverse learners, including children with special needs. As painful as it may be to turn away students, it is worse to admit students with needs your

school is not equipped to meet. (For more information on serving diverse learners, see the PEJE website.)

The Head of School should see evidence of the Acceptance Criteria in use throughout the admission program. Acceptance Criteria should be evident in the questions asked on application forms and in screenings, interviews, and print materials—in short, everything to do with admission. Of course, Acceptance Criteria should guide the Faculty Admission Decision Committee each year as members read files and discuss which students to admit. (See Components Six and Eight for more information on the Faculty Admission Decision Committee.)

COMPONENT THREE: ADMISSION CALENDARS FOR INTERNAL USE

RECOMMENDATIONS:

- 1. Refer to the calendars for internal use in your weekly meetings with the Admission Director to keep activities proactive and to monitor progress.**
- 2. Make certain that the Admission Director takes into account the Jewish calendar and all-school activities as part of overall admission planning.**
- 3. Make sure that the Admission Director provides faculty and staff with a general sense of the admission calendar.**

RATIONALE:

Internal calendars are the third most essential ingredient in a successful admission program. Calendars keep the admission process on track and on time. Calendars encourage those involved internally in the admission process to take action proactively and to coordinate their activities with one another. Their use helps prevent critical pieces of the admission process from falling through the cracks. These calendars are for use in the school and are not shared with "outsiders." Information for applicants and their families is discussed in Component Four. When the Admission Director refers to month-by-month calendars of activities—who will do what and by when—the Head of School can see that the admission program is proactive rather than reactive.

An Admission Director who is just starting out needs to create one internal calendar that lists all the main "to-dos" for the admission process. The next page displays a sample calendar of admission procedures. It is essential.

The whole school, especially the faculty, should have a general sense of the admission calendar—when key activities take place. The Admission Director can increase awareness by creating and sharing a brief summary of the admission calendar. The summary, along with the Applicant Schedule and Checklist (see Component Four), will help everyone understand what is going on with admission. A sample calendar summary for faculty and staff is on p.14.

SAMPLE CALENDAR OF ADMISSION PROCEDURES

(a k a Internal Admission Calendar)

- | | |
|-----------------------------------|--|
| SUMMER | <ul style="list-style-type: none"> • Admission Director and Enrollment Team review the process and plan for the next year • Prepare statistics/reports and print/electronic materials for the fall • Take a vacation! |
| EARLY FALL | <ul style="list-style-type: none"> • Admission Director implements plan to generate inquiries (and keeps statistics) • Admission Director distributes application forms, including financial aid forms • Board begins discussion of tuition increase for the next year • Include notices about the deadline (January 31) for submission of applications in a checklist for applicants, viewbook, newsletters to current parents, website, etc. |
| LATE FALL/
WINTER | <ul style="list-style-type: none"> • Continue to monitor the completion of applications, stressing the January 31st deadline: <ol style="list-style-type: none"> 1. Transcript 2. Interview/school visit 3. Recommendations 4. Testing/observations/screening 5. Student and/or parent essay, if applicable 6. Financial aid (FA) forms, if applicable • Board sets tuition for the next year |
| JANUARY | <ul style="list-style-type: none"> • Reminders are sent in early January for missing information including FA forms • Faculty Admission Decision Committee (FADC) begins reading and discussing applications • Financial Aid Committee (FAC) begins computation of tuition amounts • Adhere to the Jan 31st deadline for completing applications
<i>Late applicants should file everything ASAP for review on a rolling admission basis.</i> |
| FEBRUARY | <ul style="list-style-type: none"> • FADC finalizes decisions (and keeps statistics) • FAC completes computation of tuition amounts |
| EARLY MARCH | <ul style="list-style-type: none"> • Send out acceptance letters/enrollment contracts (new and returning) with FA amounts • Activate "yield" activities (keep statistics) • Deadline for return of enrollment contracts is noted in acceptance letter • Reminder to FA families for new tax returns when available |
| LATE MARCH
EARLY APRIL | <ul style="list-style-type: none"> • Reply date for all parents (Full Pay and FA) with enrollment contracts/deposits |
| APRIL | <ul style="list-style-type: none"> • Deadline: parents receiving FA send new IRS 1040 with schedules and W-2 forms to the FAC for final review • Begin preparation of print/electronic materials for next fall |
| MAY | <ul style="list-style-type: none"> • Class lists, teacher assignments are finalized • FAC completes tax reviews and FA appeals • Begin the planning cycle for next year |

Sample Internal Admission Calendar Summary for Faculty and Staff

Fall is for generating inquiries, keeping current and applicant families interested and excited about the school, and nurturing families through the application procedures. The Board discusses and sets tuition for the next year. The Admission Director keeps statistics on inquiries, visits, and completed applications.

Winter is for screening/testing, discussing, and deciding whether each applicant is a good "match" given the school's Acceptance Criteria. Acceptance letters and enrollment contracts go out. Activities start that are designed to increase the yield after acceptance. Accepted families that wish to enroll return their contracts. Activities continue that keep all families excited about what is happening in school. The Admission Director keeps statistics on acceptances, yield, and attrition.

Spring and **Summer** are for clearing up loose ends, nurturing newly enrolled students/ families through the summer, reviewing statistics, celebrating progress, and planning for next year.

There are other internal calendars that are important to have in order to track particular aspects of admission in more detail—for example, outreach activities . Also for school use only, these calendars include the following:

- calendar for financial aid
- calendar of events the Admission Director hosts or attends
- calendar of visits to feeder schools, synagogues, and JCCs
- calendar for training of admission volunteers
- calendar for designing all print and electronic materials with deadlines for submission of ad copy, drafts, and other details
- calendar for drafts and final versions of reports and statistics

The Admission Director will want to develop these additional internal calendars over time as the admission program becomes more comprehensive, but does not have to have them during the first year of work. If these calendars are part of the conversation during weekly meetings as the Head of School and Admission Director discuss progress and anticipate next steps, it will help to ensure a proactive admission process.

COMPONENT FOUR: SCHEDULE & CHECKLIST FOR APPLICANTS (A K A SCHEDULE/CHECKLIST FOR EXTERNAL USE)

RECOMMENDATIONS:

1. Refer to the Schedule and Checklist for Applicants regularly when meeting with the Admission Director.
2. Make sure the schedule and checklist are shared with the whole faculty.

RATIONALE:

The Schedule and Checklist for Applicants are tools that the Admission Director uses proactively to remind applicants of important dates and deadlines in the application process. (See the samples below.) The schedule and checklist of dates and procedures should appear in more than one place to increase the chances that applicants will see and follow them. Therefore, encourage the Admission Director to use every opportunity to get the schedule and checklist across: in the viewbook/brochure, on their own page in the application packet, on the website, in the newsletter to current parents, etc. Review the schedule and checklist with all administrators and with faculty so that everyone in the school is aware of key admission dates and deadlines.

SAMPLE SCHEDULE OF DATES AND DEADLINES FOR APPLICANTS

FALL/WINTER	Visit the school (tour, interview/screening) and file application papers
DECEMBER 12	Testing date/screening date
JANUARY 15	Testing date/screening date
JANUARY 31	Deadline for filing application papers and financial aid forms <i>Late applications will be reviewed on a rolling admission basis.</i>
MARCH 10	Decisions/contracts and financial aid amounts are mailed to families
MARCH 24	Signed enrollment contracts and deposits are due back to the school

SAMPLE CHECKLIST OF APPLICATION STEPS FOR APPLICANTS

*Steps to complete the Application Process by January 31st**

What to do:	Date completed:
1. Transcript request form	Signed and handed to school official _____
2. Teacher recommendations	Handed to teachers for completion _____
3. Interview (2nd -11th)	Scheduled for _____
3. Screening (pre-K-1st)	Scheduled for _____
4. Testing (2nd-11th)	Scheduled for _____
5. Financial Aid forms, if applicable	Filled out, mailed to school and SSS _____
6. Application fee \$50	Sent _____
[Note: The school should decide if the following pieces are required.]	
7. Student writing sample	Mailed _____
8. Parent essay	Mailed _____

* DEADLINE: January 31st

Late applications will be reviewed on a rolling admission basis.

SECTION III

SUPERVISING THE ADMISSION DIRECTOR: Other Important Components of a Proactive, Comprehensive Admission Program

"If you don't know where you're going, you might wind up somewhere else."

The previous four components—Admission Director, Acceptance Criteria, Internal Admission Calendars, and Schedule and Checklist for Applicants—form the basics of an admission program. As the Admission Director establishes a firm foundation and develops well-functioning systems, the Head of School should encourage the implementation of the components in Section III to make the admission program even more effective and truly comprehensive.

Again, take one component at a time, remembering to stop periodically, step back, and review. Admittedly, there are many details involved in a Proactive, Comprehensive Admission Program. Take the time to ensure that each of them is done well.

The seven components described in Section III are: Critical Points in the Admission Process; Outreach Using People; Outreach Using Print and Electronic Materials; Tools for Assessing a Good Match; Payment Plans, Financing Options, and Financial Aid as Marketing Tools; Statistics and Reports; and Attrition Prevention.

COMPONENT FIVE: CRITICAL POINTS IN THE ADMISSION PROCESS

RECOMMENDATIONS:

1. In weekly meetings with the Admission Director, monitor progress on each of the Critical Points in the admission process.
2. Be supportive as the Admission Director works to create an overall admission program that conveys a coherent, accurate message.
3. Keep the Admission Director up to date on activities you manage regarding attrition prevention.

RATIONALE:

There are six Critical Points in the admission process that the Admission Director and the whole school must get right. Each one is an essential part of a comprehensive whole. Moreover, each point leads to the next and is therefore dependent on prior actions. Indeed, for there to be a healthy crop of new students entering the school every year, all the Critical Points have to go well. It is the Admission Director's responsibility to view the admission process as a progression of Critical Points and to design all activities with them in mind. The Critical Points are listed below in the order that almost all applicants and their families experience them.

The Critical Points for the Admission Director to implement and track are:

- 1) Generating inquiries from prospective students and families.
- 2) Turning inquiries into visits to the school.
- 3) Turning visits into completed applications.
- 4) Improving the yield—the percentage of accepted students who sign contracts and pay a deposit to confirm enrollment.
- 5) Nurturing families from enrollment to matriculation—with the goal that all newly enrolled students start the school year.
- 6) Decreasing attrition—the number of students who leave the school before graduation—through making good matches in the admission decision-making stages as well as monitoring school-wide efforts to reduce attrition.

The Admission Director needs to carefully address each Critical Point to ensure that no one falls through the cracks either at one of the six critical stages or in the progression from Point to Point. As supervisor, the Head of School needs to know that the Admission Director is attending to each Critical Point and managing the conversion from one Critical Point to the next—that is, ensuring that as many inquiries as possible become visits and then completed applications, and so on. In non-admission language, this means successfully assisting as many applicants as possible through the sequence of admission steps.

It is the Admission Director's responsibility to keep track of information about all the Critical Points by family and in the aggregate. While the Admission Director monitors data about the fifth and sixth Critical Points, the Head and other administrators in the school are responsible for carrying out the year-round school activities that nurture students and their families, especially newly admitted ones

(see Component Eleven). The Head of School and Admission Director should know what is happening in each Critical Point and understand the implications of the statistics for each Critical Point (see Component Ten on Statistics and Reports).

The first time around, just focusing on and tracking Critical Points constitute a major step forward. Then, each summer in subsequent years, the Admission Director can develop a one-year admission plan that includes the schedule of Critical Point activities. The plan then forms a vital coordinating and monitoring tool for the Admission Director and Head of School in their weekly meetings for the next year (see Component Thirteen for more on the one-year plan). The overall goal is to move the admission process from a scatter-shot of unconnected, ad-hoc events to a coherent progression of well-designed and well-conducted activities based on an understanding of the Critical Points.

Among the questions that the Admission Director should expect you to ask are: What is the admission process doing to locate, connect with, and spark the interest of applicants and their families who aren't even thinking of a Jewish day school education? If prospective applicants/families are in the market for a Jewish day school education, what is admission doing to convey what is special about your school, what makes it different from others, what makes it impossible to resist? Finally, what is admission doing to sustain initial interest and turn it into visits, completed applications, enrollment contracts, and applicants/families who are happy with their choice of school on the first day of school? These are the types of questions that the Admission Director can answer by paying attention to the Critical Points throughout the admission process. The components that follow address ways to supervise the Admission Director as s/he tackles and manages the Critical Points.

COMPONENT SIX: OUTREACH USING PEOPLE

RECOMMENDATIONS:

1. **Agree on a series of "sound bites" that succinctly convey positive information about the school. Use these in admission activities to ensure that the school community members as "Ambassadors" are "on the same page" when they talk about the school or design outreach-related materials (see Component Seven).**
2. **Coordinate with the Admission Director so that when you reach out to nurture relationships with "feeder" and other organizations (see Key Concept Five), you are establishing a foundation for admission-related follow-up. Ask the Admission Director how you can help directly with recruitment and other admission-related events.**
3. **Make certain the Admission Director has a manageable group of carefully selected and trained volunteers—the Enrollment Team—along with key faculty and staff to help with the Critical Points in admission.**

RATIONALE:

Successful outreach using people depends on two ingredients: a set of well-crafted, genuine messages about the school and well-prepared individuals who effectively convey those messages. Through sharing what's great about the school, the school community as Ambassadors, the Head as builder of relationships with other organizations, and the Enrollment Team all help "sell" their institution to potential applicants and their families.

Compelling, Shared Messages about the School

Bring together the Admission Director, faculty, and administrators to agree on a set of common messages that the school community can use in communicating about the school. These upbeat, positive, inspiring "sound bites" should be developed carefully to capture the essence of the school and resonate equally well with "insiders" and "outsiders." Derived from the mission statement and Acceptance Criteria and sometimes known as banner statements, leitmotifs, or bumper stickers, these carefully honed marketing messages are designed to present an accurate, genuine, coherent, and compelling picture of the school and should be used over and over—at every event by everyone in the school community and in print as well. The Head leads the chorus in modeling positive communication because it involves everyone in the school and touches on every aspect of school life, from ties with community organizations to admission, development, and faculty discussions with parents.

Everyone is an Ambassador

Developing shared messages about the school is important because all members of the school community are in effect "Ambassadors" and are engaging in personal outreach every time they interact with someone external to the school community. As the saying goes, "Many voices sell a school." Students and parents who speak well of the school and recommend it to others are in the foreground of a healthy enrollment picture—the contentment of satisfied families speaks volumes to others. Faculty are often viewed as the very embodiment of the school, and thus are critical to maintaining full enrollment. The school receptionist plays a key role as the "voice" of the school; other staff such as counselors and custodians also have a part in setting the tone for the school. Finally, the leaders of the school—the Board, the Head, and other administrators—are crucial Ambassadors because their words carry official weight.

The Head's Role in Building External Relationships

No matter what size your school is, you and the Admission Director, working together, engage in by far the most critical and fruitful outreach. In start-ups or schools in small Jewish communities, the outreach that the two of you carry out may be all that is needed; schools that are large or are in large Jewish communities may need to complement in-person outreach with print materials (see Component Seven).

Drawing on the shared messages about the school, the Head seeks to inspire audiences with the vision and accomplishments of the school, thereby increasing name recognition and visibility. The Admission Director follows the Head to deepen ongoing relationships with "feeder" organizations, which lead to close contact with their students and parents. "Feeder" organizations include Jewish pre-schools, elementary schools, middle schools, Hebrew schools, synagogues, play groups, the JCC—any organization with potential applicants.

The Enrollment Team

The Admission Director chooses and trains individuals from the school community who, as the Enrollment Team, carry out many of the myriad tasks of the admission process. The Enrollment Team takes on specific and critical responsibilities such as recruiting and supporting applicants and their families through the entire admission process, primarily the first three Critical Points with selected activities in the fourth and fifth critical points. The Admission Director's charge is to manage and steer all the people associated with Critical Point activities.

Research and market surveys show that by far the best "sellers" of schools are current students and parents, and so it makes sense that they should top the list of people selected to help with admission, with the most important, high-impact, high-visibility admission tasks assigned to them. Schools use students, parents or a combination of the two to chat with potential applicants and their families when they visit the campus and take them on tours of the school. In some cases these "tour guides" may follow up with families to help them complete the application process and convince them to enroll once they are admitted. These same volunteers or other trained Enrollment Team members might participate on panels during recruitment events at feeder schools, school fairs, open houses, and parlor meetings.

Again, it is the Admission Director's ongoing management responsibility to carefully select and train all of the Enrollment Team members so that they can effectively describe the school through "sound bites" and their own individual stories to engage and inspire potential applicants and their families. The Admission Director also provides a clear outline of who will do what and by when as part of coordinating Enrollment Team activities. All of this is essential to the effective functioning of volunteers as they help applicants and their families through the first few Critical Points and beyond.

The Head of School should make certain the Admission Director chooses the Enrollment Team wisely, trains them well, and thanks them regularly. This includes ensuring that the Admission Director has assigned volunteers who are appropriate for the task, speak with the right tone and common message, aren't asked to do too much, maintain the proper balance of contact so they don't overwhelm the applicants, and are informed of the significant impact of their efforts. By supporting the Admission Director's management, you will help make sure the Enrollment Team members and their contributions fit in as part of a coherent, powerful whole that the Admission Director has carefully thought through—thereby moving the school beyond the "shotgun" approach to admission.

Faculty/Staff Involvement

With the Head's support, the Admission Director may also ask and prepare key faculty and staff to help with Enrollment Team activities such as open houses, parlor meetings, and school fairs. Because every encounter tells something about the school, the Admission Director also helps faculty and staff who interview and screen applicants to understand that they are playing an outreach role as well. The important role of the webmaster in successful outreach will be addressed in Component Seven.

The invaluable contributions to admission work of Ambassadors, the Enrollment Team, and school faculty and staff help keep a school healthy in many ways. Parents who speak about their experiences at a school Open House or host a coffee in their home spread positive communications to other current parents as well as to applicants and thereby increase admission and reduce attrition. Students who are "tour guides" or "room ambassadors" feel they are helping the school, continue to speak positively about the school to their friends, and want to stay through graduation. Faculty members who participate in screening and on the student selection committee support the students they admit. For all these individuals, participation in admission activities is an opportunity to keep what's best about the school foremost in their minds in order to represent it to newcomers.

COMPONENT SEVEN: OUTREACH USING PRINT & ELECTRONIC MATERIALS

RECOMMENDATIONS:

1. **Support the Admission Director in the integration of mission-based "sound-bites" into print and electronic communications that portray an accurate, compelling picture of the school to "outside" audiences in ways that will yield applicants who fit the school's Acceptance Criteria (see also Components Two and Six).**
2. **Support the Admission Director in making sure that the school develops a high-quality website that is "outsider"- as well "insider"-friendly.**
3. **Ask the Admission Director to choose a judicious mix of print and electronic materials, provide a written schedule for designing, producing, and disseminating them, and review progress regularly with you.**

RATIONALE:

If you start with the premise that many families are not initially in the market for a Jewish day school education, then the Admission Director must use a wide variety of mechanisms to first attract attention and then maintain interest. And for those families already searching for a Jewish education, the Admission Director has to make sure your school is among the options they consider. Once engaged, families need to be able to ascertain easily what is special about your school, what differentiates it from others, what makes it irresistible. Therefore, well-planned print and electronic materials are indispensable tools in admission work.

It is essential that the common messages or "sound-bites" developed for outreach through Ambassadors and the Enrollment Team (see Component Six) also appear in all print and electronic outreach materials. In this way, the Admission Director helps ensure that all outreach engages "outsiders" with a consistent, accurate, inspiring image of the school.

The families and students of today are accustomed to using the web. More and more schools report that families search the web for a Jewish day school in their area and read about the school before calling. Therefore, it is important to ask your Admission Director and the school's webmaster to review your website from the perspective of the "outsider," with emphasis on the following: a positive, professional look; compelling message; complete, accurate information (e.g., names of school personnel to contact, school phone number, address, schedule and deadlines, etc.); user-friendliness and appeal to prospective applicants and families; ease of access (e.g., links from other Jewish organizations), ease of navigation (e.g., buttons for admission and financial aid on your home page), and ease of use (e.g., to download application forms, view a video, leave an email, etc.). They should also review and update website information about admission on a regularly scheduled basis. As Head, you should take the lead to ensure funding for website design, monitoring, and maintenance as a fundamental tool for increasing enrollment.

To take full advantage of the website, in-person presentations, and other forms of outreach, the Head should also provide funding and encourage the Admission Director to produce a wide variety of print materials—posters, flyers, mass mailers, invitations, reminders, ads, signs, brochure/viewbook, fact sheets/school profiles, and Frequently-Asked-Questions (FAQs). These need not be slick, expensive

productions unless your school competes in a market with other schools that use such materials. The Admission Director should craft each piece to stand alone and, of course, to be placed on the school website. In addition, design of the application packet—cover letters, checklists, and forms—should permit posting on the web in ways easy to download and print.

Videos and CDs are also among the outreach products that some schools develop. While schools have produced videos for years, the use of CDs is a recent development. Because a CD can be expensive to produce, developing one is best left until your school has a well-articulated message and supporting materials that have been tested over a few admission cycles. Those institutions—large schools, high schools, and others with an experienced, professional admission process—that invest in a CD as another medium of information find that they can include a video, a viewbook, and application forms all in one place.

As noted in Component Six, in small communities and schools that are just initiating a professional admission process, the personal approach to outreach may be more appropriate than using ads, mailers, and other print materials. Personal outreach complemented by an enticing and informative brochure and an "outsider-friendly" website that give an irresistibly appealing overview of the school may be all that is necessary. In larger Jewish communities and/or schools that have been engaged in professional admission work for a while, the print materials may precede and/or follow the outreach efforts made by personnel. The kind and degree to which outreach uses print and electronic materials should be a function of "style" in your community, your constituencies, and your competition. No matter who you are, the combination of a carefully written message matched with the appropriate audience is the foundation of successful outreach in any form.

Just as you should ensure that the Admission Director and webmaster tailor the website to fulfill admission-related purposes, make certain that all other admission materials are tasteful, clear, accurate, and inspiring. Moreover, all admission print and electronic materials should look like they belong to the school's larger "family of print matter," which includes letterhead, newsletter, development resources, etc. Work with the Admission Director and those in charge of other parts of school operations to see that they agree on the common features of the school "style" and coordinate with one another as they consider new materials.

COMPONENT EIGHT: TOOLS FOR ASSESSING A GOOD MATCH — FROM THE APPLICATION PACKET TO A COMPLETED APPLICATION FILE

RECOMMENDATIONS:

- 1. Check to see that the Admission Director uses the Acceptance Criteria to develop the application packet and other parts of the application file. And ensure that all application forms, including recommendation forms, request useful information from appropriate sources who know the applicant well.**
- 2. Make certain that the Admission Director keeps meticulous records and sees to it that each application file is complete before sending it on to the Faculty Admission Decision Committee.**
- 3. Ask the Admission Director to make sure that the Faculty Admission Decision Committee uses the Acceptance Criteria in making decisions about whether an applicant is a "good match" for the school's current programs.**

RATIONALE:

Being able to assess a "good match" means the exchange of plenty of appropriate data from the school to the interested family and from the family to the school. On one hand, the Admission Director must put forth accurate, comprehensive information to applicants and families about the school so that they can figure out if it's a good educational choice from their perspective; and on the other hand, the Admission Director must gather relevant information about each applicant in order to figure out if the applicant meets the school's Acceptance Criteria. The Head needs assurance from the Admission Director that good matches are in the making.

Components Six and Seven described some of the ways in which the school reaches out to potential applicants and families and provides opportunities for them to learn about the school. In like manner, the school needs to gather information from applicants for its own decision-making process. The application packet contains forms requesting recommendations, test results, transcript, and essays/writing sample. In addition, the application packet provides information about scheduling the required interview and/or screening, as these latter pieces are critical to admission decision-making.

As part of supervising the Admission Director, the Head should seek assurance that the forms comprising the application packet and the protocols for interviewing/screening are designed with the school's Acceptance Criteria in mind (see Component Two). This means that the questions asked on recommendation forms, in interviews, at screenings, along with test instruments, all yield information about how an applicant fits the school's Acceptance Criteria.

The Admission Director is responsible for coordinating school faculty and staff as they maintain applicant files, screen and interview applicants, and make student selection decisions. Completed forms and other documents that an applicant/family submits become an application file. School personnel add screening data and interview notes. It is crucial that complete, accurate, and appropriate information about each applicant is available for the deliberations of the Faculty Admission Decision Committee. To be complete, an application file must contain all the information required in the application packet. The Head works with the Admission Director to make sure that the Faculty Admission Decision Committee reviews only application files that are complete and that the Committee uses the school's Acceptance Criteria during deliberations. Complete, appropriate applicant information underlies good admission decision-making, which can greatly improve the enrollment picture and reduce the likelihood of high attrition.

If the Admission Director is just starting out, it would be helpful for the Head to check at the end of the admission season that the Admission Director culled application files, destroying all data except for enrolled students' transcripts and family information, which are handed off to others in the school.

COMPONENT NINE: PAYMENT PLANS, FINANCING OPTIONS, & FINANCIAL AID AS MARKETING TOOLS

RECOMMENDATIONS:

1. **Oversee the development of multiple tools—payment plans, financing options, and financial aid—to make a Jewish day school education affordable for all segments of the economic spectrum.**
2. **Make sure these affordability enhancement tools are an integral part of the school's outreach to potential applicant families. Encourage the Admission Director, business office, Financial Aid Committee, and faculty to develop common language and messages to communicate with families about these tools and to coordinate their work with one another so that accepted families receive specific tuition notification in a timely manner.**
3. **Ensure that all school processes that deal with family finances, especially financial aid, are handled in a professional manner—confidential, fair, consistent, and timely.**

RATIONALE:

Many Jewish day schools strive to serve Jewish young people and their families across the entire economic spectrum. Payment plans, financing options, and financial aid are ways to help more families—well-to-do, poor, and in between—manage tuition and therefore should be tools that the school offers and markets to potential applicants and their families. Publicizing the ways in which your school works to make a day school education more affordable is a critical part of the Admission Director's outreach message.

As part of the outreach message regarding affordability, the Admission Director may find it useful to explain to families unfamiliar with the day school world that very few, if any, independent schools actually charge the true cost of education. Thus, it could be stated that every student receives reduced tuition, that no one pays the full cost. The difference between the true cost and the tuition charged is called "the gap." You, your Admission Director, and the Business Manager should decide if you want to refer to "the gap" when advertising your payment plans, financing options, and financial aid program because it speaks to your school's overarching commitment to making a Jewish day school education accessible to all.

Jewish day schools are finding that payment plans and financing options are increasingly popular among families who often do not know such programs exist until the school makes them aware. Indeed, part of convincing prospective applicant families, who often come from public school backgrounds, to consider a day school education is to discuss from the first encounter the variety of ways to finance tuition. For example, many families find that they can actually afford the tuition if it is spread out over two or more payments.

Programs such as AMS, Key, and PrepGate offer a range of services that help schools and their families manage tuition payment. The two main types are payment plans and financing options (see the Glossary for definitions). The Head of School works with the Business Manager to sign up for appropriate programs and then coordinates with the Admission Director so that information about them is included in outreach messages and Application Packets.

If payment plans or financing options aren't sufficient to enable a family to afford your school, then financial aid—also called reduced tuition or tuition assistance—is another tool to help families with demonstrated need. Rooted in the desire to provide a Jewish education for every Jewish child regardless of ability to pay, financial aid is processed through a committee comprised of two or three discreet, anonymous school professionals and/or non-parent community members. Because Jewish day schools almost always keep separate their financial aid and admission processes, the Head will want to ensure that the Admission Director coordinates the two processes. When the school makes sure that financial aid amounts go out with contracts, accepted families are better able to make a decision about enrolling. This is not only considerate to the applicants and their families, but it reduces the risk of losing a family to another school that better coordinates its processes. Overall, then, the Head needs to see that the Admission Director, business office, and Financial Aid Committee are all "on the same page" from beginning to end of their respective program cycles, using common language, providing the same accurate information, ensuring fairness and confidentiality, and coordinating their activities in a timely manner.

COMPONENT TEN: STATISTICS & REPORTS

RECOMMENDATIONS:

1. **To start, ensure that the Admission Director develops a method for collecting, organizing, and maintaining data about the Critical Points and other key information.**
2. **With the Admission Director, review cumulative totals and other statistics at least weekly, know what they mean, and know what actions the Admission Director will take as a result of the findings.**
3. **Encourage the Admission Director to share "good news" in regularly scheduled reports to appropriate groups in the larger school community.**

RATIONALE:

In order to know how the admission work is going, where success is occurring, and where improvement should be targeted, the Head of School needs to see that the Admission Director routinely gathers specific information about the Critical Points (see Component Five) and other aspects of the admission process. You should be assured that these data are meticulously maintained as part of standard admission records.

The Head of School and the Admission Director should consider the following: What statistics should the Admission Director keep? What do they mean? What do they tell you about the past and the present? What are the implications for action for the future that you get from each statistic? The statistics that chart progress, along with "soft" data such as anecdotes, help the Admission Director and the Head share successes with others, motivating them to continue their work to improve the admission picture.

Statistics associated with the Critical Points are essential to collect by grade level and analyze every year. They include:

- Inquiries (web, phone, mail, walk-in) by month
- Visits to the school by month
- Interviews/Screenings by month
- Completed Applications
- Accepts, Rejects (including "counseled out"), Wait-List
- Yield (number and percentage)
- Attrition (number and percentage)

Four other variables are critical to track by grade level as well:

- Full Pay/Financial Aid
- Boy/Girl
- Affiliation/Denomination
- Results with "Targets" (e.g., totals from "feeder" schools and other key organizations)

The Admission Director should collect data for computing these statistics accurately and completely, analyzing them along the way. In addition, computing averages for each statistic over three to five years and comparing those figures to the most recent year's can inform both current and future action. Such a review can help you and the Admission Director to see trends and make predictions.

Help the Admission Director make statistics synonymous with celebration. There will be progress, which equals success, and every success can be an occasion for acknowledging and cheering the hard work that produced it. This encourages and motivates the school community to try even harder and it builds cohesion.

Therefore, once the Admission Director gathers statistics and analyzes them, it is important to share selected findings with the appropriate constituencies. Brief reports highlight selected statistics and thus admission successes. The Head of School should support the Admission Director in protecting the confidentiality of all raw data, never sharing numbers without a context, even with the Board.

The Admission Director develops two basic types of admission reports: first, internal analyses and the Opening of School Report, which is the main document prepared for the Head of School; and second, reports distilled from internal documents for other audiences at different times.

The Opening of School Report details the final admission statistics, which are "frozen" as of the first day of school. It constitutes the official summary of the year's admission work. A "work-in-progress" throughout the admission cycle, earlier versions of the report inform the regular meetings of Head and Admission Director and serve as a departure point for discussion during the summer Admission Retreat (see Component Thirteen).

To develop reports for audiences beyond the Head of School, the Admission Director draws on relevant parts of the Opening of School Report. Typically, the Admission Director prepares the official summary for the Head, then condenses that version for the Board. There might be another version for the faculty and the Enrollment Team. In addition, the Head works with the Admission Director to decide on periodic presentations, memos, and newsletter articles for the larger community and beyond. The various ways of publicizing admission progress can't help but boost morale and improve the enrollment picture.

Suggest that the Admission Director stop, reflect, take stock, and then look to the future as part of preparing all reports. Trends, anomalies, superlatives, and implications for action are all information for the Head of School and the Admission Director to share with others. Such Reports often hit the highlights in prose rather than using charts of numbers.

Expect that the Admission Director will develop a design for data collection and analyses, along with a calendar of due dates for reports to designated audiences. Anticipating report deadlines will help the Admission Director to organize and pace communication and go a long way to ensuring that good news is spread in a timely fashion (see Component Three regarding internal calendars). The overall design for data is usually part of the yearly admission plan (see Component Thirteen).

COMPONENT ELEVEN: ATTRITION PREVENTION

RECOMMENDATIONS:

1. **Ensure that the Admission Director has the necessary attrition data, so you both can track the school's attrition percentage over time, know its causes, and work with others to reduce its occurrence.**
2. **Work with the Admission Director to make sure that there are no admission errors—that is, admitting students the school cannot serve well.**
3. **Recognizing that dissatisfaction with programs, faculty, and facilities accounts for three of the four top reasons for attrition, work with the Board to fund steady improvements in these areas (see Key Concepts Four and Five).**
4. **To address the fourth main cause—lack of school responsiveness to parental concerns—the Head of School should work with others to implement school-wide attrition prevention activities. In addition, take steps to implement an Issue Response Protocol and an Attrition Prevention Protocol, activating them as necessary in a proactive, professional manner.**

RATIONALE:

Attrition is defined as any student who leaves a school for any reason before graduating. Every school has some attrition. In Jewish day schools, tracking attrition and ensuring that everything possible is done to prevent it often falls to the Admission Director, but it is really the responsibility of the Head of School and the entire school. To begin with, the Head should see to it that others in the school carefully gather information by grade about how many students leave each year and why. The Admission Director is responsible for including attrition data in internal working documents and reports (see the Glossary for definitions).

Main Causes of Attrition

Attrition that occurs because a family moves to a new geographic area cannot be avoided. However, a school can reduce other types of attrition. Sometimes attrition can be traced to poor admission decisions or other forms of admission "mistakes." Therefore, the Admission Director needs to make certain that all applicants admitted meet the school's Acceptance Criteria (see Component Two). This means that the school should not accept candidates for whom there are not specific programs and

qualified faculty currently in place. As part of this, the Admission Director and Enrollment Team must avoid false advertising or making promises during the admission process that cannot be kept.

Non-admission causes of attrition are problems to be addressed by the whole school. Departing families most often mention dissatisfaction with facilities, programs, and/or faculty. The Board is responsible for funding and the Head of School for overseeing enhancements in these areas. If these areas show no signs of improvement, then it is wise to anticipate and plan for continuing low enrollment and high attrition.

Students leave schools for another set of reasons that is rooted in misunderstandings, lack of responsiveness on the part of the school, and other interpersonal issues. Moreover, when individual families are vocal about their discontent with programs, staff, or unresponsiveness, their dissatisfaction can spread to others and attrition figures can rise even higher.

The good news is that attrition can be reduced when a school proactively puts in place ways that school personnel can either prevent or reduce dissatisfaction by nurturing a robust school life, on the one hand, and knowing how to recognize and handle issues that do arise, on the other. The key is school-wide use of attrition prevention activities, Issue Response Protocol, and Attrition Response Protocol.

Attrition Prevention Is a Year-Round Focus with Specific Steps

"Attrition Prevention" is included in this handbook for two reasons: first, because avoiding attrition starts with the initial contact of a prospective applicant with the school and continues through the admission process to enrollment; second, while the Admission Director is in charge only of the admission process, significant attrition often has a negative impact on the success of admission. To prevent a vicious circle from developing, the Head of School must closely monitor the dynamic interrelationship of admission and attrition. Because the Head is responsible overall for the continued satisfaction of students and their families once in the school, this section also gives an overview of attrition prevention approaches beyond admission.

Attrition Prevention Begins with the Admission Process

Attrition Prevention starts at the beginning of the admission process with accurate advertising, welcoming communications, user-friendly application procedures, and responsive follow-up. This warm, inviting tone should continue once applicants are sent acceptance letters, with care taken to maintain contact with and nurture the newly enrolled students and their families during the Spring and Summer before the first day of school. Therefore, the Head of School should ensure that there is a seamless "hand-off" of responsibility for newly enrolled students from the Admission Director to other school personnel who continue to support new families and integrate them into the school community so that they remain satisfied with their choice. This kind of support is part of attrition prevention activities.

If the Admission Director follows the Acceptance Criteria, advertises accurately and honestly, and sees to it that the Faculty Admission Decision Committee uses the Acceptance Criteria in making admission decisions, then admission missteps are not the reason for attrition. At this point the Head looks to others in the school to tackle attrition problems.

School-wide Attrition Prevention Activities

Attrition prevention activities begin in earnest at the start of the school year and into the Winter, well before a family has initiated a conversation at home about leaving. As Head of School, see that there are school-wide and other activities to keep students and families happy without saying "attrition prevention"—that is, have festivals, concerts, art exhibits, class breakfasts, Shabbat dinners, etc., because they are wonderful things to do in and of themselves, not because you are focusing on heading off a negative. Involving the school's many constituencies—faculty, administration, parents, students, board, alumni/ae—in meaningful work, thanking them regularly, and sharing their accomplishments with the whole community also go a long way to maintaining upbeat attitudes and satisfied consumers. Therefore, model positive communications, both written and spoken, and encourage them in others. Constantly feed the "word-of-mouth" with good news and upbeat stories. Activities and communications that celebrate the good things at a school and keep the positive words flowing all help to stem attrition. Lastly but just as important, work continuously to improve programs, staffing, and facilities.

Attrition prevention takes many other forms. For example, at the start of the school year, the Head of School or other school personnel might call every new family to welcome them, ask how things are going, answer questions, and elicit suggestions. The Admission Director might visit with families of a grade that tends to experience attrition in the transition to the next grade—say, fifth grade, which in many schools may be the time that parents think about applying to other schools rather than continuing on to the middle school. Sometimes the Head of School works with division heads and faculty to develop a "buddy system" between older and younger grades or "moving up" activities that highlight the fun students will have in the next grade up. All of these are proactive activities that go a long way toward reducing particular types of attrition.

Issue Response Protocol

Each year in the early Fall, well before conversations about discontent develop, the Head of School should meet with the entire faculty and staff to review and activate the Issue Response Protocol. Board members should also have an Issue Response Protocol (see Key Concept Four). Then, when an issue arises, when a parent approaches a faculty member, administrator, or Board member with a concern about personnel or programs, those individuals are prepared to respond appropriately. The protocol includes: how to listen and help the parent feel heard; sample language to use to give the parent the assurance that the faculty and/or administration will respond to the issue; the timeframe within which the parent will get a response and from whom; and next steps. Responding immediately and sympathetically to all concerns will go a long way toward decreasing frustration and ultimately, attrition.

Attrition Response Protocol

Also in the early Fall, the Head needs to convene key school personnel such as division heads and advisors to review and then have the Attrition Response Protocol at the ready. By the time the school hears rumors that a family is thinking about leaving, the decision is probably pretty far along for that family. At first mention of leaving, the Head of School should activate the Attrition Response Protocol. That protocol designates the best person to speak first with the family, what to say, by when. Often, caring conversations can keep a family enrolled. Sometimes a family just needs attention, they need to feel valued, special, that the school really cares—and then they will stay.

Open-Door Letter

If those conversations aren't persuasive and the family gives notice that their student is leaving the school, the Head of School should write an official-but-warm open-door letter to the student and family that tells them how much the school values them, says they will be missed, and wishes them well. If your school has the circumstances that make it possible, tell them they are welcome to come back if they change their minds. After all that sincere, timely, responsive, personal attention, many families will return.

Exit Interviews Should Be Unnecessary

Many school administrators ask if "exit interviews" are an effective way to find out why attrition occurs. An exit interview is an in-person interview or written survey of the departing family. A school staff person or consultant conducts the exit interview, often during the Summer or Fall after a student leaves the school, with the purpose of learning the family's reason for leaving. Carried out so far after the fact, the exit interview is a reactive tool. If a school has used its Issue Response Protocol and Attrition Response Protocol, then a family's reasons for leaving are already evident. If the Head of School, teachers, advisors, and division heads have worked with a family through the decision to leave, then an exit interview is excessive, unnecessary, and may well be perceived as an insult added to injury. If the Head of School or others haven't spoken with the family, then that is what should happen before the end of the school year, rather than waiting for an exit interview later.

SECTION IV

STEPPING BACK: Assess the Whole, the Parts, the Impact — Then Do It All Again!

"Without a plan, the only way to get where you are going is by accident."

"If you always do what you've always done, then you'll always get what you always got."

"You get what you expect. The trick is to expect what you want."

If you have worked with the Admission Director through the first eleven components, now is the time for the Admission Director, with your help, to step back, take a deep breath, and look at the admission program as a whole. This section offers two different ways to do that. Component Twelve describes the importance of assembling admission-related materials in one place and suggests that you, as supervisor, encourage it to happen—over time, of course.

Finally, to complete the Proactive, Comprehensive Admission Program, the last component is about the Admission Retreat and One-Year Plan. The Admission Director uses the retreat to assess, celebrate, and plan the next year with admission volunteers and school personnel.

Gathering the "how-to" of admission in one place, reflecting on and celebrating accomplishments of the past admission cycle and looking toward the next are planful acts that improve both the ease and effectiveness of the school's admission program.

COMPONENT TWELVE: THE ADMISSION NOTEBOOK & COMPUTER RECORDS—THE WHOLE OF ADMISSION IN ONE PLACE

RECOMMENDATIONS:

1. **Encourage the Admission Director to compile a notebook over time that assembles in one place information about how your school does admission; use it in your weekly meetings together.**
2. **Urge the Admission Director to keep clearly marked, organized computer files that store the electronic versions of the notebook contents in a form accessible to one or two designated school staff.**

RATIONALE:

As the Admission Director implements the components of a Proactive, Comprehensive Admission Program, s/he should begin to fill a notebook. Very quickly, this notebook will become the Admission Director's "My World at a Glance," or "How-To Guide to Being an Admission Director at This School." Notes and statistics and calendars and sample letters and the One-Year Plan—all these are the stuff of the Admission Director's notebook, which is usually a simple three-ring binder. In addition, many Admission Directors develop their own handy "map" or overview calendar in language that works for them. The "map" lays out dates, what needs doing, where, and by whom. Collecting all these materials in one place and organizing them for ease of use will make each subsequent year's work go a little more smoothly.

The notebook contents reflect all the components of the admission program, serving both as a working tool and a repository. The Admission Director should make sure that all current materials in the notebook have a reference to their location in computer files and database, which should be backed up frequently. A few designated others should be able to easily access files in the admission computer, so that the system is not dependent on the Admission Director only. Paying attention to these matters may seem obvious, but all too many schools never get to this point and they spend valuable time each year floundering for information or "reinventing the wheel." The Admission Director will welcome your encouragement in this area because you are indicating that you know that it takes time to be well organized and you support that use of time.

COMPONENT THIRTEEN: THE RETREAT—CELEBRATE & PLAN THE NEXT YEAR

RECOMMENDATIONS:

1. **Encourage the Admission Director to hold an annual Admission Retreat for all school personnel involved in admission to celebrate, reflect, and plan.**
2. **Expect the Admission Director to prepare a written One-Year Plan each summer and use it in weekly meetings during the next admission cycle.**

RATIONALE:

Every year at the end of the admission cycle, the Admission Director should gather those involved in admission for a retreat to review the past year and plan the future. Taking the time to look back each

year at the same time gives a benchmark of where you have come from and can give you a clear picture of where you want to go next. Trends from the past may give good insight into what to expect in the future. Stopping to review affords an opportunity to name and celebrate your successes.

The Admission Director, of course, attends the entire retreat, along with the admission support staff and, in larger schools, admission officers. For specific portions of the planning session, the Admission Director might invite some or all of the following: the Head of School, division heads, webmaster, communications director or marketing specialist, the learning specialist, key members of the Enrollment Team, the business manager, the director of financial aid or the chair of the Financial Aid Committee, and other school personnel who work with admission.

The Admission Retreat is important for developing shared understandings about admission as a whole and how its many parts relate to one another. It is prime input to the One-Year Plan, which the Admission Director prepares over the summer to guide the next year's work. The operating plan includes both a review of the admission program's efforts over the last year and recommendations, modifications, and plans for the coming year. The plan will cover most or all of the components outlined in this handbook: Critical Points, personal and print/electronic outreach, calendars, statistics, and new "target" markets, along with ways to measure success. The Admission Director's objective is to specify realistic goals for the school's unique circumstances that can be pursued, accomplished, and celebrated. As you and your Admission Director review the One-Year Plan, you should focus not only on "hard" data but also on "soft" yet tangible objectives appropriate to your setting—"do-ability," "follow-through," and "meaningful success" are key words here.

Over time, the Admission Retreat and One-Year Plan will become cornerstones of your school's Proactive, Comprehensive Admission Program. Whether the Admission Director gathers with one person or a group, planning is a way to celebrate the past and map out the direction for the next season.

If the Admission Director has implemented all the components in this handbook, then your school truly has established the elements of a Proactive, Comprehensive Admission Program. If the Admission Director, with your active support, keeps at it, each newly implemented component will become routine after a cycle or two. Because establishing a Proactive, Comprehensive Admission Program is a major innovation for a school, expect the whole to become routine a couple of cycles after adding the last component. Above all, taking on such a program means that you are taking the lead in helping your school to work together on enrollment, an essential priority for most Jewish day schools.

Here's to excellence in admission and all areas of Jewish day school life!

GLOSSARY

Admission Encompasses all the steps involved in identifying and bringing new students into the school: recruitment, marketing/advertising for admission purposes, attrition prevention, financial aid and financing options as a marketing tool, and more.

Admission Director The part-time or full-time paid professional who focuses exclusively on admission (including recruitment, advertising, attrition prevention, etc.) and is trained in admission for a Jewish day school.

Application fee A small, non-refundable fee that families pay at the beginning of the admission process. The fee is usually paid at the time a family submits an application (recommendation forms, transcript, family information, etc.). The school sometimes uses it to pay a testing supervisor. The fee should not be confused with the enrollment contract and deposit (see below).

Attrition Students who enroll and matriculate but leave without graduating. It is expressed as a yearly total. This number is most helpful when expressed as a percentage. Be certain to use the correct numbers when computing attrition statistics.

How to calculate attrition: take the full enrollment (FE) from the last school year, subtract the graduating class (GC) to get the adjusted enrollment (AE). Now, total the number of students who left the school for any reason other than graduating during the last school year and that is the attrition number (ATN). Divide the attrition number by the adjusted enrollment to get the attrition percentage (AT%). $FE - GC = AE$; $ATN/AE = AT\%$.

Brochure (see Viewbook)

Deposit When a family has been admitted and decides to enroll (or re-enroll), a deposit (6-10% of a family's tuition) accompanies the enrollment contract to reserve a space. The deposit is applied toward tuition and is non-refundable except in rare circumstances. It should not be confused with the fee paid at the beginning of the application process.

Enrollment contract When an applicant has been admitted and decides to enroll, the family signs an enrollment contract to reserve a space. A deposit usually accompanies the contract. Some schools use the terms registration form and fee in error when they really mean enrollment contract and deposit.

Fact sheet (see School profile)

Financing options A way to make tuition more manageable. Financing options require a credit check, offer low- or market-rate interest, and permit flexible length of repayment. They can be used separately or in conjunction with payment plans. Families apply directly to the loan organization, not through the school.

Payment plans A way to make tuition more manageable. A payment plan requires no credit check, no interest, and only a small fee. Payment, which can be divided into 2, 8, 9, or 10 parts, begins in the Spring and ends around December or January. The school must subscribe to a payment plan in order for a family to be eligible to use it.

Registration Independent schools do not use the term registration. Registration form and registration fee are terms often confused with application form and fee or the enrollment contract and deposit. Registration means "sign up" and does not imply an application or selection process. Thus, registration is not a term used when referring to the admission process.

Retention (also see Attrition) Some people prefer to use the term retention to mean keeping students from matriculation through graduation, but it is rarely used in independent school admission. Others see retention as what happens when a student fails a grade—s/he is retained to repeat the grade. This handbook uses the terms attrition and attrition prevention rather than retention.

School profile (also known as the Fact sheet) A one-to-four page summary of information about a school. The purpose of a school profile is to share in the best possible light the facts and statistics that "sell" a school. Designed as one of a school's "family" of print materials, the school profile presents the school in strong, positive language that is often in a list or other easy-to-read format. In addition to contact information (the name of the school, address, phone, fax, email, website, email addresses of key school personnel), the school profile conveys the school's mission (i.e., its *raison d'être*, the outcome of being in business, what happens to graduates as a result of this school's education, what this school prepares students to do next). The school profile outlines the curriculum, faculty, and accreditation. It lists the schools/colleges that graduates attend. In addition, secondary schools include the grade point averages, class rankings, graduation requirements, and AP and SAT test score ranges. (This document is not only used by the Admission Director but by other school professionals as well, e.g., college placement director, development director, etc.)

"Think admission" To be really effective in admission, the Admission Director needs to think like an "outsider," someone not yet in the school: What are the needs of the "outsiders?" What is on their minds? Where are they? How can I reach them? A successful Admission Director needs to think about admission constantly, designing and conducting activities that answer questions such as, Who is appropriate for the school? Who meets the school's Acceptance Criteria? Where can I find them? How

can I get them interested enough to complete the application process and enroll? Thinking admission is more about the "art" of connecting well with the right people than it is about the "science" of conversion ratios, percentage of market share, branding, and numbers.

Viewbook Also known as the school brochure or catalogue, this publication is an essential part of a school's print materials. It contains upbeat, enticing information about students, programs, faculty, facilities—everything about life at the school. Often there are pictures and/or drawings and testimonials from satisfied students and parents. For high schools, it may contain the course of study or the latter may be a stand-alone piece. It should be written with what parents and students need and want to know in mind rather than what school people want prospects to know. It should be included in the application packet.

Yield The yield is the percentage of accepted students who enroll. The yield figure reflects the fact that some students will decide not to come after they have applied and been admitted.

How to calculate yield: Take the total number of students who enroll (E) and divide it by the total number of students accepted (A) to get the yield percentage (Y%). $E/A = Y\%$.