

Executive Summary

Stratospheric tuition. Escalating costs. Shifting demography. Expanding choice. The value proposition. These and other numerous external factors can potentially damage, or even deplete, the new student prospect pool, so schools must pay more attention than ever before to marketing concerns. While many equate marketing with advertising and promotion, making the most of external initiatives begins with a cohesive and collaborative internal effort. The most effective school marketers recognize the power of partnerships among key internal stakeholders, including faculty, admissions, development and finance staff. Integrating departmental functions is not only good leadership and management — it's great marketing. By listening carefully to those you seek to serve, making sure all stakeholders understand their roles, and putting the right technology infrastructure in place to support communication, schools can foster strong internal collaboration that helps to advance their missions.

Maximizing Marketing to Advance Your School's Mission

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Marketing Matters

Whether we like to admit it or not, competition in the independent school world is on the rise — from home-schooling to other private options to an increasing array of public magnet and charter schools. The National Association of Independent Schools reports that admission officers must identify 910 prospective students to fill 100 spots. In 1990, admission officers averaged 10 contacts with families to secure an enrollment. Today, the number of multiple visits to the campus and follow-up necessary may be as high as 30 contact points. In this economy, parents are much more value-conscious than ever and demand hard evidence to prove that your school is worth what it costs. The message is loud and clear—to thrive in this environment you must take steps to differentiate your school from the alternatives and demonstrate value.

Conveying how your school is different and demonstrating why it is worth what it costs will help you attract a quality field of prospective, mission-appropriate families. This effort — the hard work that goes into differentiating your school and demonstrating the value you offer — should be a part of everyone's job. Although only some people in your school may actually have the word “marketing” in their titles or job descriptions, stakeholders across the organization play critical roles in conveying a positive, unified message. Make no mistake — marketing is not just about advertisements and press releases. For today's independent schools, marketing is also about the daily details, such as getting the amount on the tuition bill correct, sending grades to the right contact person and keeping assignments on the Web site updated daily. Each interaction provides an opportunity for your school to reinforce and validate enrollment and donor decisions.

The Critical Role of Collaboration

Good marketing begins within an organization and relies on collaboration. Learning research tells us that cooperation and connections among subjects, students, and teachers increase learning.

Ironically, we do not often see this approach being applied to the way schools are managed.

Admissions and development officers usually see their roles as separate. Teachers often don't understand the important part they play in enrollment, retention and in reinforcing to donors the value of their investment in the school. Business officers, who oversee many of the customer service aspects of the school, often aren't consulted by development and admissions officers. We seem to live in different tribes and don't always focus on what unites us: the achievement of the mission. Too often, each office works to its own objective and doesn't consider its impact on the whole operation.

As a former teacher, academic dean, admissions director, communications director, development director and advancement director, I have seen schools from many perspectives. If I've learned anything, it is that success in one's own job depends on others being successful in theirs. *The success of our mission depends on recognizing that we're all interdependent.*

Everyone in the school should be held responsible for advancing the mission. Everyone markets, everyone recruits, everyone fundraises and everyone at the school is a teacher. Why? Because all whom we seek to serve — from prospective families to our alums to our wider communities — experience us as a whole. Great marketing, like effective learning, occurs when there is a structure and expectation for collaboration and cross-fertilization.

Busting the "Silos" : Three Steps to Building Strong Internal Collaboration and Marketing

So how can we break down the silos that often result from our vertical organizational charts and get everyone working together across the organization to advance the mission? Taking these three steps can get you on track: 1) Assess your school's internal marketing opportunities; 2) Listen. Conduct the marketing research necessary to ensure your mission's viability; and 3) Explore ways for key stakeholders to contribute to the successes of the others, and therefore to the sustainability of the mission.

1. Assess internal marketing and collaboration.

Begin by getting a clear picture of where you are in terms of collaboration — both the opportunity to collaborate and the environment that nurtures it.

- ◆ Is there congruence among major administrators and faculty leaders about the school's identity, mission and direction?
- ◆ Do the school's academic, admissions, fundraising and business office functions work in concert to maximize external marketing? Is there a concerted effort to bring all of the institution's human resources to bear on enrollment and fundraising goals?
- ◆ We know that our prospective "customers" need to understand who we are, where we are going and what we value. Do we give the same information to our internal audiences? Particularly faculty? Staff? Parental leadership? Alumni leadership? Students?

Everyone in the school should be held responsible for advancing the mission. Everyone markets, everyone recruits, everyone fundraises and everyone at the school is a teacher.

Get a clear and objective sense of your school's identity and value from the perspective of those you seek to serve. An internal marketing assessment reveals who *you* think you are and whom *you* think you serve; an external image audit reveals who *they* think you are and whom *they* think you serve. How similar or different are the two perspectives?

For practical tips on how you or your department can contribute to stronger internal collaboration and improved marketing, see our Appendices:

Head of School	Appendix A
Admissions Professional	Appendix B
Development Professional	Appendix C
Faculty	Appendix D
Finance and Operations	
Personnel	Appendix E

Cohesive internal marketing and a coherent internal image are equally — if not more — important than external promotion. This foundation is necessary to ensure and sustain the success of external marketing initiatives. The credibility of a viewbook, Web site, public relations campaign or any other external promotional tool depends on whether *what it describes is what is actually experienced*. Word of mouth, a school's most powerful promotional tool, originates internally. An internal environment of collaboration, coordination and collegiality is critical to enrollment, retention, public relations and philanthropic goals.

2. Listen to stakeholders and conduct external marketing research.

Get a clear and objective sense of your school's identity and value from the perspective of those you seek to serve. An internal marketing assessment reveals who *you* think you are and whom *you* think you serve; an external image audit reveals who *they* think you are and whom *they* think you serve. How similar or different are the two perspectives?

Ensuring congruence of mission and image both internally and externally is the goal of an image audit. Particularly if conducted by a third party, an image audit aids recruitment, retention and philanthropic efforts by giving an objective and confidential perspective of your school from the viewpoint of constituents, referrers, donors and the external community.

The messages and themes generated by an image audit provide data to recalibrate programs and may include testimonials for letters, viewbooks, magazines or newsletters, Web site, email, open houses and other events. The data forms the foundation for a communication and marketing plan, admissions and development office organization, new Web site content, and feedback on programs and services. Quantitative surveys are fine, but qualitative research does a better job of revealing factors that drive decisions to enroll and donate.

There are literally dozens of constituent groups you should systematically monitor; whose pulse you take will depend on your goals. But among the most fundamental are those in your admissions process, current parents, young alums, first-time donors, major donors and the larger community of referrers and potential referrers. Because the population of a school moves upward and out of the institution, periodic and systematic research is advised. Perceptions of quality are subjective and constantly shifting. Stay ahead of the curve.

3. Maximize everyone's role in marketing the school through collaborative relationships and mutual support.

When your internal team is aligned with your mission and vision, and you have external evidence of the viability of your mission and how you deliver it, ensure that everyone in the school is advancing the mission. To develop a culture of collaboration and mutual support, refer to the extensive tips — by function — provided in the appendices. As you get started, remember that every key stakeholder on your staff will play a role in advancing your mission.

Putting it all Together with Technology

Making the most of your marketing — and your mission — depends on more than the people within your school and the cross-departmental processes you develop. Successful marketing also relies heavily on technology. In this new century, good organizations — for-profit, nonprofit and public sector — all look to technology to support their critical processes.

From a marketing perspective, a solid technology solution can help your school representatives present a unified front to the different constituencies they reach. Just as the people on your cross-functional team need to collaborate, so do the technology solutions you use. To maximize the effectiveness of your marketing, your staff needs to be able to tap into information collected and maintained across your campus. Ultimately, each office should have a complete view of a student's progress within your school. Equipped with such information, your staff will be able to provide better customer service and avoid embarrassing situations in which one key contact is not aware of important information. In addition, with a better grasp on each student's activities and progress, you can better tailor personalized communication to parents.

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Choosing a technology solution for a school is a complex process driven by many different goals — not just marketing. But remember, when deciding on a technology solution, your ability to use it to help you market and communicate more effectively should be a top consideration. When evaluating technology from a marketing perspective, look for a solution that:

- ◆ Provides rich functionality to power all the critical areas of your school (admissions, business, registrar's and development offices) that support today's nontraditional family relationships.
- ◆ Allows you to share information across offices, providing a complete view of each student and ensuring school-wide access to accurate, updated information.
- ◆ Offers integrated Web-based services that allow students/parents/faculty to interact with your school 24/7. By connecting your Web site to the school's campus-wide technology solution, you can provide a new level of personalization to parents while also increasing efficiency.

Equipped with a solid technology solution, your school will be primed to collaborate more effectively. And by working together, stakeholders can help the school improve its internal marketing and communications, in turn enabling you to deliver on the vision established by your external marketing activities.

Appendix A: Head of School

Interdepartmental and interdivisional cooperation and communication are mandatory if marketing efforts are to pay off. The single biggest influence on this is the head of school, or school leader. His or her personality, approach to leadership, values and attitudes about relationships, sense of professionalism, collaboration and style of decision-making set the tone.

- ◆ **Model Marketing.** If a head of school constantly asks, "*How can we make this better? How can we be more responsive? How can we anticipate challenges? How can we reinforce all the positive things we do?*" he or she is modeling marketing, and others will know it's a priority. Keeping these questions at the forefront of every administrative and faculty discussion helps everyone focus on keeping the mission viable and the school responsive to changing needs and shifting perceptions of quality.
- ◆ **Articulate the vision at every opportunity.** There are four statements every leader needs to be able to address repeatedly in a variety of ways until they are embedded in the culture: "*Who we are, what we stand for, why it matters, and where we're headed.*" The answers need to be simple enough for everyone to embrace, and, like the mission statement, should

serve as a pivot point for all decisions. These statements reflect the heart of your identity, define your value, and give the mission momentum. All administrators and faculty should express and own these statements.

- ♦ **Expect cooperation** among all departments that interface with students and their families, including admissions, business, academics and counseling, residential life, athletics and development. Do not overlook the importance of administrative and support staff in marketing because they are often the first contact for prospective and current families, donors and referrers. They must be kept informed.
- ♦ **Endorse and fund market and image research** and expect the data to be interpreted into a strategy. Base your programs, services, and publications on the research. Recognize that your promotional tools should not be a mirror of administrators' values; rather, they should reflect what is valued by your constituents in the language of those you seek to serve.
- ♦ **Hire people with collaborative skills as well as those with the right job experience.**

Defining, managing and fulfilling expectations is the best way to develop a positive lifelong relationship with your school.

Appendix B: Admissions Professional

The admissions office does much more than represent the school to prospective families. To them, the admissions office *is* the school. The following tips can help you make a strong positive impression and simultaneously assist your colleagues in other administrative offices and help the faculty succeed.

- ♦ **Manage expectations. Be specific about what you can and can't do.**
Make sure a prospective family's subjective expectations are aligned with what your program delivers — and what you expect of them. A clear and helpful discussion about expectations builds confidence in the institution.

Defining, managing and fulfilling expectations is the best way to develop a positive lifelong relationship with your school. With the input of faculty and other administrative offices, describe as specifically as possible:

1. *Profile of a successful student/family.* They are all different, but what traits do they have in common that can help ensure a successful experience at your school?
2. *Profile of a student/family who would be at risk.*
3. *Learning expectations by grade or division.*
4. *The skills, attitudes and values a graduate is expected to attain as a result of his or her experience at your school.*
5. *Parental partnership and behavior expectations.*

The more specifically you describe expectations, the more easily families will be able to determine whether your school is appropriate for them.

- ♦ **Build a culture of philanthropy during the admission process.**
Admissions directors can do much to increase the awareness of the critical importance of philanthropy, but they are often reluctant to do so because they're afraid that mentioning the

annual fund or capital campaign during the admissions process may be a “deal killer.” But the damage done from perceptions of a “bait and switch” from families not so informed can be far greater.

Beginning with your promotional literature and continuing with admission events, as well as in the interview, tour, and school visit, educate each prospective family about the school's structure of finance and governance, the importance of annual fund participation and opportunities for volunteerism. Explain specifically how philanthropy supports the mission of your school and, most importantly, the *benefits it creates for each student*.

- ◆ **Involve the entire institution in the recruitment of students.**

The impression gleaned from the first visit is the single most influential factor affecting enrollment. The visit needs to be planned and executed to ensure a proper match between the student host and the prospective student, as well as to ensure that a student and family's interests and concerns are addressed by the appropriate people while they are on campus. Adults on campus, current parents, alumni, students and others who follow up with prospective families should be highly organized, trained and responsive. Events designed to link current and new students and family-to-family pairing programs need similar care and continuing evaluation.

- ◆ **Stay connected with the business office and other school administrators to ensure a smooth transition for new families into the school.** Ensure that the personal, welcoming experience you created in the admissions process is reflected in the follow-up processes of the business office and in the handoff to the head and division directors. The admissions process is based on nursing a relationship into commitment. The moment an individual commits and signs the contract and the handoff to the business office occurs, the tone of the conversation can quickly do a damaging “180.” Sometimes the business and registrars’ offices can become aggressive to ensure compliance with the contract, receipt of permission forms and other registration information. If the business office and other school offices aren’t working with your admissions office to make each student's/family's transition smooth, they may do irreparable harm to your newest constituents’ trust and confidence in the school. Keep each other informed. Remember that re-enrollment begins on Opening Day.

Appendix C: Development Professional

Among the chief roles of the development office is to educate the adults in the school's extended community. Each fundraising event and communication is an opportunity to educate everyone about the school's value – *what you do and why it matters*.

- ◆ **Cultivate and deploy all of your school's human resources for fundraising.** Everyone is a potential nurturer of donors and a communicator of the school's mission and vision. The most successful fundraisers know this and tap into all the school's stakeholders.
- ◆ **Work with your CFO to get ownership of the long-term financial health of the school.** Many development offices measure their success by reaching the financial and participation goals of the annual fund, but it is more strategic to consider at least a five-year

plan for operations, the physical plant, the endowment and capital needs. What net assets will be created over the next five years?

- ♦ **Help donors understand their role in growing the school's net worth and advancing its mission.** If donors insist on restrictions, help move them to the least restrictive gift. Allow the board to do its job of determining how gifts can be invested for higher yields that will stretch the value of each donation.
- ♦ **Confer with administrators and faculty as you organize the fundraising process.** Discuss, recommend and facilitate appropriate cultivation and stewardship activities.
- ♦ **Encourage all administrators to meet at least annually to discuss shared messages and key themes** for the coming year's events and publications and to set the head of school's schedule for outreach and cultivation.
- ♦ **Arrange joint travel plans with the admissions office for receptions and alumni events.** Prospective families want to see the outcomes of your school's programs, so encourage cross-fertilization of potential, current and past families and alumni at your events.
- ♦ **Routinely meet with the admissions and business/academic leaders to discuss your school's marketing objectives.** Help set the school's research agenda, encouraging donor support for research that will keep your institution on the cutting edge. Based on the research, participate in establishing the school's key marketing messages, which often become the messages you use in development.
- ♦ **Help the admissions office identify and encourage positive alumni,** who can provide first-hand evidence of the benefits and value of the education you provide, to call on prospective families.
- ♦ **Develop relationships with key faculty** members to ensure they understand how your role in the school can positively impact their effectiveness as teachers. Make sure the faculty — especially the faculty — understand the goals and rationale for fundraising.

Good independent school marketing recognizes the critical role that teachers play in admissions and development. Teachers need to know how they can be influential with prospective families and donors.

Appendix D: Faculty

Academic quality, the top reason families say they choose a school, is judged by evidence of inspiring teachers and inspired teaching. Good independent school marketing recognizes the critical role that teachers play in admissions and development. Teachers need to know how they can be influential with prospective families and donors.

Why is their involvement in marketing critical? Without faculty support, most external promotional initiatives will fail. Teachers have credibility. Most expect heads, development directors and admissions directors to speak positively about the school. But when a teacher talks about how good the school is, *it really makes a difference.*



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Tips for administrators to encourage faculty support:

- ♦ **Educate faculty to the fact that you can be true to your mission while also listening and responding to those you seek to serve (your market).** Explain that you agree that marketing objectives must support the mission and also be in line with the school's values. Because marketing is all about connecting, building, retaining and deepening relationships, help your faculty understand your goals and convince them of the role they play in securing the school's market position.
- ♦ **See the world through their "lens."** Spend time with faculty at school events. Ask about what motivates them. Let them know you want to tell the world about what they do and why it matters. Ask how you can best communicate their goals for the students and what they want students to gain from having known them. What's the most important lesson a student will learn from the teacher?
- ♦ **Share marketing research and image audit projects** with faculty prior to conducting the research, and then share the results, what the results mean to the school, and next steps. Help ensure faculty buy-in by including them from the beginning.

Tips for faculty to support administrators:

Admissions directors are trying to fill the school with students who will benefit from the education that the faculty deliver. Development directors are trying to increase the school's financial assets — assets that will impact programs, keep tuition increases at a minimum, and attract and retain effective teachers and mission-appropriate students. Faculty, development and admissions staff are natural partners. Faculty can contribute to advancing the mission when they:

- ♦ **Provide school leaders with information and opportunities** to keep the school at the forefront of teaching and learning research.
- ♦ **Understand that retention of students is a shared responsibility.**
- ♦ **Communicate with parents beyond formal communications.** If parents are difficult or demanding, encourage the school to put professional development funds into customer service training.
- ♦ **Welcome prospective families** into the classroom and let them know what you're doing and what everyone is learning.
- ♦ **Communicate "public relations" opportunities** to the appropriate people.
- ♦ **Alert the division director and the head** when they suspect a child is unhappy or possibly applying out to other schools.

Appendix E: Finance and Operations Personnel

Although the stereotypical business manager used to wear a green eyeshade and made journal entries, today he or she is evaluated on a wide range of responsibilities, and securing the position often requires an MBA. In fact, the business office has a major impact on customer service that can positively impact or derail the success of admissions and development. Maintenance and grounds, housekeeping, food services, parking, signage, security, safety and event management are customer service functions. Even behind the scenes, business managers and their staff assume a major role with both prospective and current families, donors and other constituents.

Business officers or CFOs, who can make a major impact on advancing your school's mission, should:

- ◆ **Equate the budget with the quantification of the mission statement.** Help others understand how the budget fulfills the school's mission.
- ◆ **Help everyone achieve a sense of responsibility for the long-term financial health of the school.** Be a consultant to other offices to help them become more entrepreneurial. Provide them with the big picture and a long-range point of view. Meet with your budget centers proactively and provide them with monthly reports on their expenditures and expected revenue.
- ◆ **Work with the admissions office to make the school as affordable as possible.** Help admissions directors and their staff communicate affordability options. Help qualify families for financial aid and ensure they can cover their contribution to the tuition.
- ◆ **Be a supportive leader, coach and problem solver.** Pay attention and ask questions — not to interfere — but because you are excited about what others in the school are doing to advance the mission. Get involved in the school community by visiting classes and attending athletic events and performances. Change the stereotypical image of the CFO as the one who always says “no” to the one who works with others to find alternative ways to say “yes.” Lead by example by not allowing anyone to fall back on phrases such as, “it's not my job,” “that's not the way we do it here,” or “we've never done it that way before.” Encourage employees to stay with a call until the problem has been solved rather than bouncing around the caller to other offices.
- ◆ **Make sure there is a communication plan in place to ensure that the business office is connected.** Work with the admissions and development staff to help plan a master calendar that itemizes production schedules, recruitment and fundraising events, enrollment and reenrollment events and deadlines, and other important functions. Use electronic calendars and shared databases when possible.
- ◆ **Promote marketing research (institutional listening) as an investment rather than an expense** in the continuing viability of the mission and the quality of the school.

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