

Guidelines for Interpreting and Scoring Benchmarks

13.1 *The communications/marketing plan requires the school leader/leadership team and staff to ensure the implementation of contemporary, multiple information technologies to reach target audiences and to establish reliable and secure databases and accountability to stakeholders.*

I. What does this benchmark indicate for school performance?

The leadership team is accountable for institutional development, which includes a coherent, shared communications marketing plan for advancing the name, identity, message, and good news of the school. This plan recognizes multiple audiences including donors, families, students, alumni and local community leaders. This plan is reviewed and critiqued with others to be certain the plan is timely, relevant, and has clearly delineated the targets for all communications. The plan reflects the mission of the school and make sure that this mission is central to the communications/marketing message. This requires the oversight of a database, which includes each target audience outreach, response and a strategy for sharing this data with investors, parents, board members, and other stakeholders.

II. As a review team member, what evidence do I look for?

Here are some fundamental guiding questions which will help frame this item:

- Is there a detailed, clearly understood plan?
- Is there evidence of an intentional design for the advancement of the school's mission and message?
- Does the plan include the creation and maintenance of research and data to monitor communications?
- How are the targeted audiences determined and delineated for communication? Is this part of a plan?
- Are the requirements for technology and media included in the planning?
- Is there a time line for implementation and costs associated with this plan?
- Are there reports or summary reports that are shared with stakeholders and demonstrate the accountability of all school leaders?

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III. What are the key differences between the levels of the rubric?

At level 3-Fully Meets Benchmark,

the marketing/communications plan exists and clearly delineates the staff person responsible and measures of accountability. This can be found in documents/tapes/videos, which provide examples of products used by the schools. (Look at samples of communications to stakeholders and be certain they are effective.)

The technology plan is precise and technologies selected are designed to reach target audiences with explicitly stated expected outcomes. Analysis of data, by target audience, is clearly available. Samples of databases are present and clearly articulated and all evidence is timely and demonstrates professional preparation of materials.

At level 4-Exceeds Benchmark,

The items listed in level 3 above are clearly delineated in a strategic plan with timelines, scenarios for outputs, and costs associated with each step. The plan includes timelines for revision, review, critique and updates. New communication strategies are synchronized with the advent of new populations arriving in the neighborhood and waiting to be served by the school.

Dashboards for quick and efficient reporting and upkeep of data are provided with summaries able to be reviewed by the leadership team as well as strategies for change. Work on all of the above is marked by collaboration above and beyond simple cooperation.

At level 2-Partially Meets Benchmark,

The plan exists but is not fully vetted or supported by the community, either financially or verbally and often is not connected or articulates the mission, which is disconnected from the message. This makes it difficult for staff and community members to capture a unique and unified message about the school.

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Technology/media strategies are “yesterday” and not reaching today’s targets. (Look at what local businesses are doing to see what is contemporary.) Data collection is weak and/or not reliable, as no one person has ownership or one person has ownership and does not share or collaborate. The accountability to stake holders ends in the principal’s office or at the board level; it is not shared with the community. For all practical purposes the analysis of outcomes is not based on real data.

At level **1-Does Not Meet Benchmark,**

there is no plan, or no one knows about the plan and it is not used or is viewed as having little connection to the mission of the school. Current leadership is not sure who created it or why.

Technology resources are weak and no person or team is accountable for creating and implementing a marketing/communications plan. Enrollment is down, morale is poor and most people in the neighborhood do not know about the school; new populations have no idea there is a school or think it is a private/independent school.

NOTE: It is very important to carefully ascertain that the school’s mission is central to the marketing message and that all who learn about the school learn as well about why the school is there and whom the school will serve. Effective marketing and communications campaigns sell the heart and soul of the school and the face of the kids. Without a shared and embraced MISSION driven message, no advancement or enrollment/marketing plan will succeed.

IV. What are some key suggestions for improvement?

In general, for any of these areas,

- Use your assessment data based on the scoring above
- Delineate what you have to do (and what you can do), and carefully plan your steps to move forward.
- Do not try to do it all at once. Make all of this part of your strategic plan for change and transformation.

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To move from level 1 to level 2,

- Designate leadership responsibility to a team or person to create a plan with all facets clearly delineated, including cost, time, target etc.
- Review plan, critique, refined and adopted for implementation.
- Ensure the knowledge and skill sets necessary are in place to implement the media strategies required as well as the technology tools for data management.
- Implement any training required.
- Hire, if necessary, a person with these specific talents and experiences.

To move from level 2 to level 3,

- Move to a level of analysis of the target data.
- Use multiple information technologies that are intentionally designed by the leadership team to reach multiple audiences.
- Work to establish databases that are secure and can be used by the team as well as the person designing the database.

To move from level 3 to 4,

- Ensure that a person or team of persons is truly responsible and accountable as part of their position expectation.
- Make this communication plan a part of the strategic plan.
- Build a timeline to plan for the future expansion of the marketing plan as new populations or new communication channels present themselves.

V. What are key terms for common understanding? (Refer to Glossary for the key terms listed below.)

Target Audience
Marketing/Communications Plan
Institutional Advancement

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13.2 *The enrollment management plan requires the governing body to review and the school leader/leadership team to supervise annual and continuous measurement and analysis of both enrollment and retention patterns for all student groups.*

I. What does this benchmark indicate for school performance?

Benchmark 13.2 is about leadership, supervision, accountability, enrollment data and students. This requires data and knowledge of how to collect data on enrollment, how to measure and analyze the data, and more importantly how to plan based on the data analysis. The governing body holds the leadership team accountable for providing the data and the governing body reviews, analyzes, and advises with support. The leadership team works with an analytical team that is continuously measuring enrollment data and patterns based on very specific criteria for the measurement of the data that is based on enrollment management research and best practices, and found in professional publications and professional development opportunities.

II. As a review team member, what evidence do I look for?

Here are some fundamental guiding questions which will help frame this item:

- Does this plan reflect the mission, with a focus on who the school serves as well as why the school exists?
- Is there a formal communication agreement between the board, leadership team and enrollment management team?
- How do they communicate, how frequently, when, why, and what are the results? Is there evidence of this collaboration?
- Who leads and how is the collaboration fostered for the creation of strategy etc.?
- Are there guides to measurement, timing of measures and how measures are used?
- Are there guidelines regarding where and when data is collected?

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- Do data sources include multiple audiences such as: current school populations, alumni, those who chose not to attend the school, realtors, shop owners, donors, and opinion leaders in the community?
- What data is collected and how is it used?
- Who is gathering the data and using it to analyze retention?
- What challenges are listed as needing to be addressed?

III. What are the key differences between the levels of the rubric?

At level **3-Fully Meets Benchmark**,

the plan reflects a serious articulation of the mission with a strong focus on WHO the school serves and a plan to target that population. The review team sees and reviews the plan and the schedule used by the governing body to review the leadership team and supervise annual measurement and analysis. The work is focused on both enrollment (including all pertinent variables and their measures) and retention, and includes demonstrated use of pattern and prediction analysis – for example, statements like “If X continues then we can expect Y” should be common. The assessment is timely and is executed on schedule, and those in charge are accountable to deliver the data for timely decision making by the board and the leadership team. All decisions regarding tuition, tuition assistance, development/marketing strategies and community outreach and involvement are informed intentionally by this data.

At level **4-Exceeds Benchmark**,

the above listed items are enhanced by a more focused and analytical approach. For example: Where are the students the mission statement claims are served by the school? Are these students represented and where might one find more? All operations planning – including technology, physical plant, etc... - are informed by the data. The governing body reviews the data and actively assists with the development of data and its analysis. Reviewers should find evidence of this in documents provided by the board, including board meeting minutes, committee assignments, plans, and

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implementation strategies. State of the art techniques are used to gather past and current demographic data and this data informs future predictions for the parish, community, diocese, and any “benchmark” schools with which one competes. Any diocesan planning or policies for planning are carefully reviewed and related to the work. Most importantly, the review team finds data in the evidence that demonstrates serious and sustained analysis, which is integrated and continually generates new questions, which drive new analyses. All of this work is based on the school’s mission.

At level 2-Partially Meets Benchmark,

the plan exists but is not fully articulated or vetted by the community and is not completely informed by the mission. Recruitment strategies are based on “needing to increase the numbers” rather than on the school’s mission. Data collection and analysis are not planned and there is no evidence of professional data collection or analysis. The limited data gathered is used by a few leaders in the school, and there would be evidence of this in planning documents provided by those few staff who use the “numbers” provided.

At level 1-Does Not Meet Benchmark,

there is no plan and no clearly defined measures for developing criteria for measurement, analysis or planning. No one is accountable to the governing body or the school leadership team and there is no understanding of the critical role such a plan fulfills for the operational sustainability of a school. Strong indicators may include: low enrollment (or a recent negative change in enrollment that is not well-understood by school leaders) and low morale. Leadership behavior has become membership driven (that is, focused on keeping current families happy and enrolled regardless of how this impacts the school’s mission). The community has accepted lower curriculum standards or lowered requirements for entry into the school.

NOTE: It is very important for all involved in the development of a recruitment and retention plan to start with the “who” in the school’s mission statement. If the statement is long, not clear or confusing, it must be redone before there can be an effective enrollment, recruiting or retention plan.

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IV. What are some key suggestions for improvement?

In general, for any of these areas,

- Use your assessment data based on the scoring above
- Delineate what you have to do (and what you can do)
- Carefully plan your steps to move forward.
- Do not try to do it all at once.
- Make these steps part of your strategic plan for change and transformation.

To move from level 1 to level 2,

- Review, with the leadership team and the governing board, the mission statement and be certain it is clear, concise and answers the questions “why” and “who”.
- Initiate the development of an enrollment and retention plan as well as listing the data necessary based on this review.
- Include in the process of developing an enrollment plan, a listing of the staff, students, families, donors and community leaders
- Address how the school will continue to keep each of these groups engaged beyond the initial planning development period and into the (much more difficult) data collection, analysis, integration and implementation phases.

To move from level 2 to level 3,

- Review the current enrollment/retention plan in light of the school’s mission statement and revise and reform as necessary. (Often, issues with implementation stem from a lack of clarity in the plan itself, or in a lack of alignment between the plan and the school’s mission.)
- Define the criteria and measurements that will be used to “mark” progress and status.
- Determine agreement among all stakeholders regarding the markers and the measures.
- Define a time line for improvement/execution, be clear about how much it will cost, and start simply.
- Delineate the two parts (retention and recruitment/enrollment) – both are essential and will require planning with the finance committee as well as those involved in student management and oversight.
- Include in the process a healthy discussion of the mission and how it drives the enrollment and retention strategies.

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To move from level 3 to 4,

- Verify that you have an overall operations plan. This is where the retention and enrollment recruitment planning has to become real.
- Work to educate everyone – board members as well as staff and faculty – regarding what a good enrollment and retention plan looks like. (This is both an art and a science)
- Hire a consultant or expert in this area to guide those in charge (consider reaching out to colleges and universities, whose internal admissions departments may contain or have access to such experts).
- Create a culture of continuous improvement for those involved in the planning and execution of the plan.
- Adhere to your measurement rules. Do not change the measures without careful consideration of how that will affect the data and long-term analysis (remember that changes may make comparisons to prior years unworkable).
- Stress analysis followed by decision-making based on that analysis.
- Show respect for the work and the numbers, even if involved persons do not like what they summarize.

IV. What are key terms for common understanding? (Refer to Glossary for the key terms listed below.)

Measurement
Analysis
Retention
Tuition
Cost per Child

Guidelines for Interpreting and Scoring Benchmarks

13.3 *The development plan requires the school leader/leadership team, in collaboration with the governing body, to ensure that key strategies are in place to identify, grow and maintain significant funding prospects, including alumni/ae, over time and when appropriate*

I. What does this benchmark indicate for school performance?

Benchmark 13.3 is about people as funding prospects. School leaders and leadership teams should be able to develop “friends” who become funding prospects and soon donors and supporters of the school. This requires strategic analysis of current community members, alumni and community leaders, as well as parents and grandparents. Who are they, where are they, and what are their relationships to the school? Planning includes strategies to develop these friendships, from the obvious to the unusual through personal approaches. These are the people who will support the school for years to come. This is also about recognizing all potential supporters, including the current students.

II. As a review team member, what evidence do I look for?

Here are some fundamental guiding questions which will help frame this item:

- Do the mission and vision statements inform the development of who to reach out to as friends to become supporters?
- Is there an analysis of who else is serving the population served by the school or of those who support endeavors that support this population?
- Is there evidence of who might be a school colleague in the field?
- Is there evidence of communication demonstrating collaboration or cooperation on planning to cultivate donors over time?
- Does the data demonstrate a “growth” in the number of friends and donors?
- Is the data analyzed with a focus on the growth in numbers – and how that correlates to a growth in contributions?

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III. What are the key differences between the levels of the rubric?

At level **3-Fully Meets Benchmark**,

key strategies are in place to develop the plan to grow and maintain a donor base. These strategies are related to an operations plan and the marketing/communications plan. These strategies are integral to those plans and key to the funding strategies of the governing board finance committee

At level **4-Exceeds Benchmark**,

key strategies are more than just *related* to “other plans” - they are critical to the success of other plans. School leaders and those responsible hold themselves accountable for adopting new practices and strategies for the development of new friends and new donor accounts. K-8 schools look at high school strategies and high schools look at college and university practices. Guides to philanthropy and foundations are the tools used and referred to by this team. Board members engage in introductions and invite experts from industry to meet, coach and share ideas with staff and the leadership team. Most importantly, everyone is held accountable as results are measured, accounted for and studied over time with course corrections a common strategy. Everyone in most categories is considered always to be a potential friend and then a potential donor. Measures are in place which allow assessment of potential donors, foundations and the management of prospect possibilities.

At level **2-Partially Meets Benchmark**,

the plan exists but is not fully vetted or supported by the community, either financially or verbally and often is not connected to or does not articulate the mission; as a result, funding is trapped in the same, old funding options, most of which are NOT appealing to today’s parent-funder population. The plan is usually not well designed, nor is it shared with the full community. Transparency is not a hallmark of planning and all potential donors are left out of the plan. The plan is not aligned with the communications/marketing plan and the message is muddled. The lack of integration across all plans is sorely obvious and consequently pushes potential donors away, instead of welcoming the donors.

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At level **1-Does Not Meet Benchmark,**

Usually the concept of development is not established. School leaders and others view development as a series of distinct and unrelated events, which are not supported by the mission and which simply raise money for things, not for a plan. Small funds are literally raised by using students to sell items, such as candy and wrapping paper. There is no clear explanation of the role of students in development planning. These elements should not be identified as a plan in place.

NOTE: Development hinges on mission. Foundations give to support programs, which articulate mission. Donors give to support the mission, which is clear and demonstrates outcomes for people. Development plans should be so irresistible that many donors want to be recognized members of the effort.

IV. What are some key suggestions for improvement?

For any of these areas, use your assessment data based on the scoring above, delineate what you have to do and what you can do, and carefully plan your steps to move forward. Make all of this part of your strategic plan for change and transformation and try not to do it all at once.

To move from level 1 to level 2,

- Share and build community support for the mission and the outcomes associated with the mission.
- Develop a plan to fund the achievement of the outcomes (strategic plan) and as part of this plan develop a plan with funding outcomes and strategies.
- Define the funding options and begin slowly but very carefully marking and measuring all strategies and successes.

To move from level 2 to level 3,

- Plan to move beyond limited funding strategies and opportunities and expand the options.
- Plan for this to become an iterative process, with a constant review and update of a highly flexible and adaptive plan.

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- Include the development of a communications plan, as it is integral to the development plan.
- Ensure that all messaging is managed internally to be consistent and attractive.
- Make certain that the plan is focused on key elements
- Employ all school leaders to effectively implement the plan.

To move from level 3 to 4,

- Continuously evolve the plan so that it becomes fully integrated with communications and enrollment planning.
- Ensure that all plans are synchronized and share message, marketing materials and strategies for bringing more people into the community.
- Commit across school leadership to convert everyone in the community to value the school and its key role in building the larger community.
- Recognize that potential donors represent all sectors, all faiths and all walks of life.
- Pursue foundations to create innovative partnerships in areas such as higher education, other Catholic schools, and other schools in the community.
- Viewing funding opportunities as funding for the children of the community, not the children of just one school.
- Recognize that “reach” is key and expansion of school’s reach with success moves one to level 4.
- Assess all results to allow for critical refinement of plans
- Utilize effective advice from experts in the field.

IV. What are key terms for common understanding? (Refer to Glossary for the key terms listed below.)

Advancement
Mission statement
Marketing/ Communications Plan