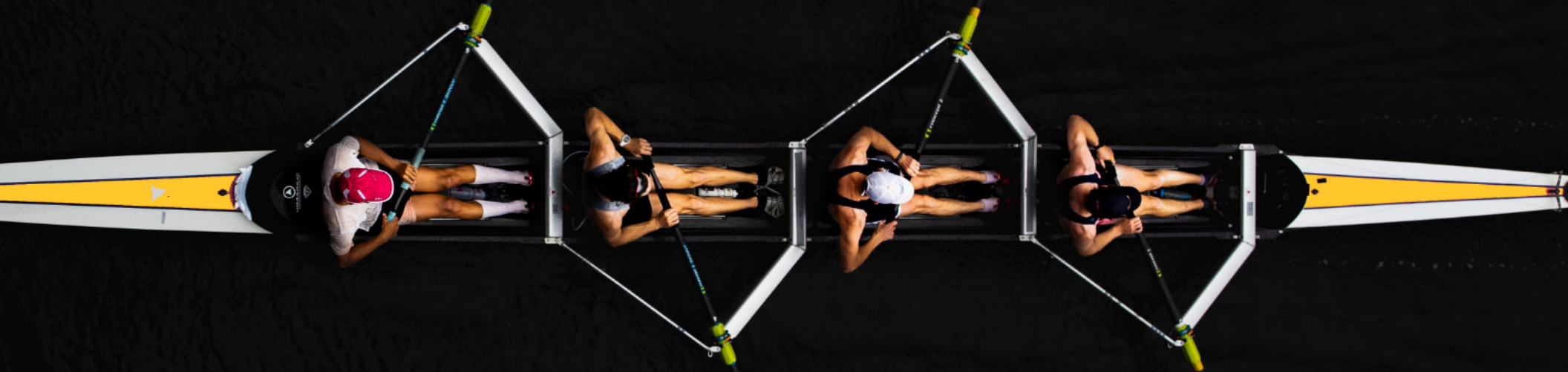




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# Pulling In The Same Direction



*Everyone's Role in Advancing the Mission of the School*

**by Mike Connor, President, Connor Associates**



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RESEARCH / VISION / STRATEGY / RESULTS

Mike Connor is Founder and President of Connor Associates, a communication, marketing, enrollment management, and fundraising advocate for public and private schools and nonprofit organizations. With 16 Strategic Partners and Research Associates across the United States, Connor has worked with hundreds of clients spanning four continents and 26 states since 1998.

Prior to founding Connor Associates, Mike was an experienced teacher, coach, counselor, academic dean, admission director, development director, director of communications, and director of advancement at independent boarding and day schools.

This comprehensive experience puts Mike in a unique position to offer valuable services and strategic vision to schools, and to convey that the success of a school or organization is dependent on everyone taking responsibility for admission, marketing, and fundraising — not just those who hold those respective titles.

Mike is co-author of the National Association of Independent Schools' (NAIS) book, *Marketing Independent Schools in the 21st Century*. His white paper, *It's What's Inside That Counts: Maximizing Internal Marketing*, has been digitally published by NAIS and many state, regional, provincial, and international private school associations.

His work with schools has been published in the *Washington Times* (DC), *Los Angeles Times*, and *Education Week*. Because he is connected with the latest educational trends, and his research is grounded in actionable data, Mike is in demand as a speaker at education conferences around the world.

[www.connor-associates.com](http://www.connor-associates.com)

# The Case for Internal Partnerships



Conventional wisdom tells us that up to 80% of all new enrollments will come to you from positive word of mouth. Word of mouth begins *inside the school.*

Even before the global pandemic turned our world outside-in, independent schools were already facing stunning challenges. Escalating costs. Stratospheric tuition. A major decline in inquiries threatening the closure, merger, or repurposing of schools. Shifting demographics. Expanding choice at a much lower price point, to name several.

These challenges have been met with a variety of tactics addressing how schools “deliver” education with on-campus, remote learning, or a hybrid model. Schools are also expanding the online platform and channels they use to “sell” themselves as they’ve leaned increasingly into social media and inbound-marketing. Still, to be effective, all of these new adaptive tactics need to be supported by recognizing that our ultimate responsibility is to assure families that our school’s value is greater than the cost. This is essential if your school wants to remain or regain relevance as a compelling option in your market, regardless of the platforms or channels your school uses to promote itself.

While many may equate marketing with external promotion, public relations, or advertising, making the most of these external initiatives begins

with a cohesive and collaborative internal marketing effort. Up to 80% of all new enrollments will come to you from positive word of mouth. Word of mouth begins *inside the school.*

The most effective way to create value and positive word of mouth is to nurture and support the power of partnerships among key internal stakeholders, including the Head of School; trustees; financial and operational officers; divisional and departmental heads; educators; and the departments of enrollment management, admission, communication, development, marketing, and alumni relations. The best independent schools recognize that everyone working in the school must have an attitude and practice of *inter-dependence.*

By listening and looking for internal opportunities to collaborate, by listening carefully and confidentially to those you seek to serve externally, and by making sure all internal stakeholders understand their interdependence, a school can successfully maximize marketing and advance its mission.



A.

## The Role of Head of School, Divisional, and Department Heads



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. His or her personality, approach to leadership, values, and attitudes about relationships, sense of professionalism, collaboration, and style of decision-making set the tone. That tone, when supported by the following six statements, define the school. Everyone in the school must boldly broadcast your school's response to these statements:

*“Who we are, who we are not,  
what we stand for, what we will  
not stand for, why we matter,  
and where we're headed.”*

These statements define the school's brand and identity. The Head of School has to model the brand and identity at every opportunity and ensure all employees and trustees are on the same page.



## *Model Marketing*

A Head of School is modeling marketing if he or she 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?” If that’s the case, then others will know marketing is a priority. Keeping these questions at the forefront of every administrative and faculty meeting helps everyone focus on keeping the mission viable and the school responsive to changing needs and shifting perceptions of quality.

## *The Head Should Expect Collaboration*

The Head should expect collaboration among all departments that interface with students and their families, including admission, business, academics, emotional support counseling, residential life in boarding programs, 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 as their credibility is priceless.

## *Define the “Mission Appropriate” Student*

There needs to be school-wide agreement about those students and families your school best serves and those it cannot. By clearly stating what constitutes a mission-appropriate student, you will help families self-select your school and support the work of admission. The bolder you are in taking this stand and charting where you are headed, the more likely you will attract families who will resonate with that vision and want to follow you there.

## *Get a Grip on Reality!*

Leaders need to expect, endorse, and fund market research that will locate future mission-appropriate families; monitor reasons for non-conversions, conversions, and yield; and promote authentic messages for retention. Expect the research data to be interpreted into actionable strategy and tactics!

Understand where your best customers are now, and where they are likely to be in five years. 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 your constituents value about your school, in their own words.** And that means listening frequently and objectively to those you serve and seek to serve.

Use what you learn through marketing research to ensure that your mission meets the market, and that you can promote the best teaching and learning possible.





B.

## The Role of Faculty and Staff



There's good reason that faculty and staff are “first among equals” and on the front lines of demonstrating the value of the school. Academic quality, the top reason families say they choose and stay in a school, is judged by evidence of inspiring faculty, inspired teaching, and excited, fearless learners.

It's all about teaching and learning. Good school marketing recognizes the critical role that faculty play in admission and development. Teachers need to know how influential they can be with prospective families and donors.

*Faculty and staff hold all the credibility cards.*

Why is their involvement in marketing critical? Without faculty support, most external promotional initiatives will fail. Most of our families expect heads, development directors, and admission directors to speak positively about the school. But when faculty or staff members talk about how good the school is, *that matters*.





# Tips for Administrators to Encourage Faculty Support

## *Teach the Faculty*

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 essentially about connecting, building, and deepening relationships and shared values, help your faculty understand your goals and convince them of the role they play in securing the school's reputation.

## *See the World Through Their “Lens”*

Spend time with faculty at school events. Ask 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 their students and what they want students to gain from having known them. What's the most important life-long lesson a student will learn from that teacher?

## *Encourage Appropriate Faculty or Staff to Offer Their Perspective*

Parents look to faculty to provide advice on educational, ethical, and character issues. Encourage faculty to offer themselves for interviews on TV or radio, to write opinion-editorial pieces for social media or newspapers, blogs, and record videos. Taking a stand on issues advances the public debate about education as it reinforces your core values. A school's recognized leadership in education validates enrollment, re-enrollment, and donor support. What can you do to be recognized as the leader locally? Regionally?

## *How is Your School Viewed from the Outside?*

Share your plans with faculty for marketing research, such as image audits or alumni surveys, before you begin. Then share the results, what the results mean to the school, and next steps. When faculty can see how the school is seen from the outside-in, it can be a real motivator for them to step up to their marketing role.



## *What Can Faculty Do To Promote Enrollment and Retention?*

Have them consider their perspective on the following questions and ask them to share their answers at admission events, parent conferences, and on videos, blogs, or social media.

- Why did you choose to teach/coach here?
- What do you enjoy most about teaching/coaching?
- What motivated you to become a teacher/coach?
- Who are your mentors? What lessons from these mentors have had the most influence on you and why?
- What do you want my child to get from having known you?
- What is the most important life lesson you want my child to learn in x course/activity?
- What do current and past parents and alumni tell you about the impact you made?
- What interests you outside the classroom? What are you personally passionate about?
- What are your favorite moments with a student?
- How do you help them learn how to learn?
- How do you get the results you want each student to achieve?
- How do you keep current with the subject areas you cover and apply the latest learning research?





## C.

### The Role of the Enrollment Management and Admission Professional



To a prospective family, the admission officer *is* the school. To do an effective job and to earn your prospects' respect, consider the following:

#### *Manage Expectations*

Be specific about what your school can and cannot do. Make sure a prospective family's subjective expectations are aligned with what your program delivers — and what the school expects of them as parents and students. A clear and helpful discussion with parents about expectations helps them build confidence in your school.

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. The profile of a successful student/family. What traits do they have in common that can help ensure a successful experience at your school?
2. The 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.



The more specifically you describe expectations, the more easily families will be able to determine whether your school is appropriate for them. In your literature, in the interview, in all communications — confidently define and manage expectations right from the start!

### *Treat Your Inquiries, Visitors, and Referrers as if They Were Major Donors*

In terms of tuition income, philanthropy, and referrals of new students, the value of the right inquiry over a lifetime relationship with your school is enormous. Enrollment management and admission offices can learn much from development professionals about the art of “moves management” — how to move someone from being a disinterested outsider to an evangelist for the school.

In enrollment management, there are at least 16 distinct touch points between the admission officer and a prospective family and student from the time he or she inquires until they become an attending student.

- Do you have a communication plan for each step for your appropriate inquiries?
- How do you move them through the funnel?
- Do you use faculty, trustees, parents, past parents, and alumni to help you make the case?
- Once they enroll, have you developed a strong retention plan with other school administrators, faculty members, and the development officer?



Personalized communication and *value-related* information are more important than ever to prospective families. **These trends have put an incredible burden on enrollment management, admission, and school administrators, who not only must educate, but must also prove that the education will produce the desired outcomes to justify the investment.** Therefore, tracking alumni outcomes is critical. (More K-8s need to take credit for the preparation!) It is in the school’s long-term interest to make sure that the enrollment management, admission, and alumni relations offices work hand in glove.

### *Involve the Entire School in Student Recruitment*

The impression gleaned from the first visit is the most influential factor affecting enrollment. The visit needs to be planned 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 *before they get to campus* and 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.

### *Build a Culture of Philanthropy*

Enrollment and admission directors can do much to increase the importance of philanthropy, but they are often reluctant to do so, concerned that mentioning the annual fund or capital campaign during the admission process will be a “deal killer.” But the damage done from perceptions of a “bait and switch” from families not so informed can be far greater, and lead to negative word of mouth.



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*. New families benefit from the philanthropy of those who came before.

### *Create a Smooth Transition for New Families*

**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 create in the admission process is reflected in the follow-up processes of the business office and in the handoff to the head and division directors.

The enrollment process is focused on incoming families and is based on nurturing a relationship into commitment. The moment when that enrollment commitment occurs and the business office becomes involved, the tone of the conversation can sometimes quickly change. Sometimes the business and registrars' offices can become assertive to ensure compliance with the contract, receipt of permission forms, and other registration information.

If the business office and other divisional school offices work together with admission to ensure a smooth transition into the school, they will reinforce and enhance your newest constituents' trust that was engendered in the enrollment process. It is equally important, especially in a K-12 school, to make sure there is compelling evidence to keep families moving upward through the school from one division to the next. This becomes the responsibility of faculty and divisional directors.

Ultimately the responsibility and success of retention primarily rests with the Head of School. Lower School faculty and staff should be expected to "sell up" to the next grade or division; Upper School faculty and staff should "reach down and scoop up" Lower School families. It's all about "cross-pollination." The admission office, meanwhile, must track re-enrollment but needs to keep vigilantly focused on "incoming."

*Re-enrollment begins as soon as the new enrollment contract is signed. It's all about reinforcing and validating value. Pay as much attention to the marriage as you do the wedding!*



## D.

### The Role of the 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. Purpose is key. Making your audience believe that your school is not only a school but a CAUSE is critical to raising friends and funds.*

#### *Cultivate and Deploy All 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, including faculty and students.

#### *Work with Your CFO to get Ownership of the Long-term Financial Health of the School*

Many development officers 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 must be created over the next five years to advance the school's mission?





## *Help Donors Understand How They Can Be Most Effective*

A school's assets include its reputation, curriculum, human resources, as well as its financial assets. If donors insist on restrictions, help move them to the least restrictive gift. Allow the Board to do its job of determining how philanthropy can be invested for higher yields that will stretch the value of each donation.

## *Confer with Administrators and Teachers*

Discuss, recommend, and facilitate appropriate cultivation and stewardship activities. Students can be your most effective stewards when they communicate with donors to express their appreciation for a gift that personally benefited them as a student. Ultimately, it is the students who benefit directly from improved facilities, programs, and other opportunities that donors create.

## *Meet with Leaders to Discuss Marketing*

Set the coming year's events, publications, and communication plan with leaders including the head of school's schedule for outreach and cultivation. In addition, set the school's research agenda, and encourage donor support for research that will keep your institution on the



leading edge. Based on the research, participate in establishing the school's key marketing messages, which often become the messages you use in development.

## *Arrange Travel Plans or Remote Events with Enrollment Management*

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.

## *Identify and Encourage Positive Alumni and Past Parents to Assist in Enrollment*

Make it easy for families in the admission and re-enrollment process to communicate with alums and past parents. Their testimony about how the school or a particular teacher made a difference in their lives — their first-hand evidence of the benefits and value of the educational experience your school provided — can be the most compelling and credible rationale for enrollment and donor decisions.

## *Develop Relationships with Key Faculty*

Ensure they understand how your role in the school can positively impact their effectiveness as faculty. Make sure the faculty understand the goals and rationale for fundraising and how development supports them and their goals for their students.



## E.

### The Role of the Communication and Marketing Professional



Those who are responsible for communication (and that includes everyone) should concentrate their messages on the four key elements of an educational value proposition.

These give you the structure that will support nearly all internal and external messages about the school. Remember: *When value is not understood, price decides!*

#### *Demonstrate and Promote Value*

You demonstrate value when you can *prove* you are:

1. Making a difference in those whose lives you touch. (ROI.)
2. Pushing the envelope of good practice. (**Innovative and transformative teaching and learning.**)
3. Providing unique solutions to a family's needs. (**Customer intimacy, connection, convenience.**)
4. Stewarding resources and running an efficient organization. (**Cost-consciousness and stewardship.**)

Communication needs to continually reinforce and validate a family's decision to apply, enroll, and continue with the school through graduation.





*A strong school identity is a critical factor in attracting and keeping families and donors.*

## *Build an Authentic, Differentiated Identity*

A strong school identity, which brings with it pride of association, is a critical factor in attracting and keeping families and donors. Make sure that everyone inside the school can personalize and share their experiences around these six statements. The clearer you are, the more you will appeal to the families and students you can best serve.

1. Who We Are.
2. Who We Are NOT.
3. What We Stand For.
4. What We Will NOT Stand For.  
What behaviors or attitudes may weigh against a long-term relationship with the school?
5. Why We Matter.  
The “Why” must go beyond a typical mission statement or vision. This is the CAUSE you represent that will rally supporters, so it needs to be a bold call to action that will compel both current and future families. If your school didn’t exist, why would it need to be created?
6. Where We’re Headed.  
This represents not only a cogent future vision for the school, but where you are taking the family. Describe the journey and experiences you are providing them, and the intended skills, values, and attitudes you want to provide for their child that they will master when they graduate.





## F.

### The Role of Finance and Operations Personnel



For far too long, business officers in schools have been an overlooked and under-appreciated marketing resource. Is the business manager or CFO only responsible for collecting receivables?

Years ago, the stereotypical business manager was an accountant who wore 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 an impact on customer service that can positively impact or derail the success of admission and development. In both boarding and day schools, the business office typically oversees maintenance and grounds, house-keeping, food services, parking, signage, security, safety, and event management. These are all, ultimately, customer service functions!

Even behind the scenes, business managers and their staff play a major role with both prospective and current families, donors, and other constituents.





# Business Officers, COOs, or CFOs can Advance the Mission When They:

## *Understand School Culture*

Schools don't move as fast as the corporate world. More consensus, more collaboration, and more consultation with others is expected.

## *Explain the Budget*

Equate the budget with the quantification of the mission statement and explain it to others in the context of your mission and vision. Demonstrate how the budget fulfills the school's mission and vision.

## *Promote Shared Responsibility*

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 (admission, development, summer programs, and others), and proactively provide them with monthly reports on their expenditures and expected revenue.

## *Make Tuition Affordable*

Work with the admission office to make the school as affordable as possible. Help admission directors and their staff communicate affordability options. Help qualify families for financial aid to ensure they can cover their contribution to the tuition.

## *Inspire*

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 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 business office employees to stay with a constituent call until the problem has been solved rather than bouncing the caller to other offices.

## *Communicate!*

Make sure there is a communication plan in place to ensure that the business office is connected. Work with the admission and development staff to help plan a master calendar that itemizes production schedules, recruitment, and fundraising events; enrollment, re-enrollment events, and deadlines; and other important functions. Use electronic calendars and shared databases when possible.

## *Invest in Research*

Promote marketing research as an investment in future revenue rather than an expense that will ensure the continuing viability of the school's mission.



## G.

### The Role of the Board of Trustees



It's the trustees, and the trustees alone, who are ultimately responsible for securing your children's *children's* school. The Head is their *only* employee. The buck for a school's success or demise stops with its Board.

The market-savvy Board must secure the sustainability of the school through its fiduciary responsibilities, but its ambassadorial role has now become critical.

Trustees should be cultivated not only for their financial resources, time, and talent, but also for their sphere of influence and their reach into the community and region. The Board should support the school by managing collective contacts to encourage new leads and potential families. They should help build partnerships with businesses and non-profits to raise visibility, relevance, public purpose, and to offer real world educational experiences that will prove your school is an asset to the greater community.

A good starting point is to examine the Board's collective network — its "sphere of influence."








*To Increase Your School's Sphere of Influence, Ask Each Board Member and Potential Trustee:*

1. On what other boards do you serve?
2. To which professional associations or non-profit service organizations do you belong?
3. In what youth organizations are you involved?
4. With whom do you have relationships in the media?
5. With whom do you have relationships in government?
6. With whom do you have relationships or affiliations within schools or local colleges?
7. List your memberships in organizations and clubs in the area.
8. Is there anyone in your network (individual or organization) whom the school should encourage as a referrer of students?
9. Is there anyone in your network (individual or organization) who should be approached as a potential supporter or funder?
10. In what way might you be most effectively engaged as an ambassador for the school?



*...a singular focus on  
“deep pockets” as the  
only requirement for  
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gone. Trustees must  
be the connectors and  
primary ambassadors  
for the school in the  
community.*

Of course, other leaders in the school should maximize their relationships in the community, too. But the Board must set the pace by:

- Leveraging its collective network.
- Encouraging objective market research to ensure your mission and the market intersect.
- Expecting positive outcomes for graduates.
- Looking for innovative strategic partnerships that will raise relevance, and visibility as a community asset.
- Helping the school they hold in trust stay on top of fast-moving trends.

Back in the day, 50-year Head of School Frank Boyden at Deerfield Academy famously remarked that a trustee’s only job was to show up in his office with a handsome check “when I summon you.” While it is still expected that all trustees will be the first to support an annual fund or capital campaign, a *singular* focus on “deep pockets” as the only requirement for trusteeship is no longer viable. Trustees must be the connectors and primary ambassadors for the school in the community.

Schools that are grounded in the communities that surround them will have a clear advantage now and in the future. It will raise your visibility, feature you as a community asset, and expand real-world opportunities for student learning.





## Pulling It All Together

To make everyone's role in advancing the mission more than an aspiration, we need to think laterally, transcending our individual job descriptions and roles. We need to encourage discussion about our various office's needs, expectations, and priorities. We need to listen to the pressures facing our colleagues. We need to be willing to pick up the balls others drop. We need to let our colleagues know that our objective is to help them succeed.

*Ensure that everyone in the school understands his or her important role in advancing the mission. Our constituents — past, present, and future — expect nothing less than extraordinary!*

Collaboration requires institutional as well as personal self-confidence. We must intentionally look for ways to make connections with our colleagues that will support and reinforce their efforts toward our common goal — the advancement of the mission.

Your school's "brand" doesn't live in a logo. It doesn't live in your viewbook or on your website. They help communicate your brand, but they are limited tools. **Your school's brand, identity, and value live in the minds of those you seek to serve.** Great word of mouth and pride of association, the best promotional tools ever, originate inside the school, and move outward. They are influenced by the quality of relationships created by faculty, building and grounds personnel, division directors, administrators, trustees, parents, alums, and everyone in your extended community.

Ultimately, it's all about relationships. Families enroll and re-enroll, alums donate, and foundations support your school largely to the extent that you have formed strong personal bonds with them. A campaign or marketing program that conveys a desirable image to the public is fine, but it is nothing compared to how people *experience* your school. It's what's *inside* that counts.

Assess your potential for stronger internal collaboration. Conduct marketing research to ensure alignment between what you intend and what your constituents experience, as well as to ensure the continuing viability of your mission. Using objective marketing research, reinforce and recalibrate as needed to achieve or maintain a competitive, leading edge.

**Break down those internal silos and fiefdoms! Connect the marketing "neurons."** Ensure that everyone in the school understands his or her role in advancing the mission. Clarify not only who has the responsibility but also who has the authority. Our constituents — past, present, and future — expect nothing less than *extraordinary!*



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