THE Recipe for Retention

Cooking up an award-winning retention strategy for your private school
Table of Contents

Introduction .......................................................................................................................... 01
Why You Need to Perfect Your Retention Recipe ............................................. 04
How to Whip Up a Five-Star Retention Recipe ................................. 07
  • Laying the groundwork (mise en place) .............................................. 09
  • Ingredients matter — gather the right team for the job .............. 10
  • Turn up the heat by carving out goals and setting metrics ...... 13
  • Delve into data and analyze current trends ................................. 15
  • Delegate tasks so you can cook to perfection ............................... 19
  • Stay inspired and aligned in the kitchen ..................................... 21
  • Execute the dish ................................................................................ 24
  • Cook, fail, tweak, repeat ................................................................. 33
Cooking with the Right Utensils ................................................... 34

BONUS: 15 Mouthwatering Recipes For Retention Success [Cheat Sheet]
This year has thrown curveball after curveball our way. It has left all of us scrambling to innovate, adapt, and—yes—pivot to meet our goals. From stabilizing finances to meeting student enrollment numbers, we’ve learned that what worked before doesn’t necessarily work now. Families are joining and leaving schools for reasons they never have in the past. So, now we have to think of retention with renewed focus and creativity as well.

Cooking up a retention strategy, or spicing up your current one, is a project that will continue to pay off long after the pandemic is over. It might just be your recipe for success when it comes to long-term sustainability.
Retention stats

7%  
The median attrition rate for K-12 Schools  
(NAIS 2019-2020 trend book)

52%  
Schools that have seen increases in voluntary attrition over the last 3-5 years  
(EMA SOTI Report)

25%  
Schools with a retention committee  
(EMA SOTI Report)
With average attrition rates sitting around 10\%, the average-sized school (around 180 students) will lose 16-17 students per year. That comes out to a whopping $176,000 \textit{per year} based on the average annual tuition of $11,000 for an independent K-12 school.
Attrition is a tricky problem that can compound in both complexity and cost. Even before coronavirus rocked the world, admission and enrollment professionals were feeling increasing pressure to grow their base of prospective students while also being tasked with convincing currently enrolled families to return.
A few of the reasons you’ll want to perfect your retention recipe include:

**Retention is key to hitting enrollment goals**

Over the past few years, independent and private schools have been facing growing competition, and more than half (a whopping 52%) of schools have seen increases in voluntary attrition in the past three years, according to data from the Enrollment Management Association (EMA). With more schools vying for families’ attention, you want to make sure that you’re beating out your competition from the start and keeping your families coming back each year. Doing so is the only way you will hit your enrollment goals year after year.

**Mitigate the impact of COVID and the rise of non-traditional families**

For many schools, COVID-19 has led to an influx of new and non-traditional families enrolling at private schools. Many families switched from public to private schools in search of in-person instruction offerings for their children and better virtual learning opportunities if in-person still isn’t possible. Ideally, you want these families to stick around for the long haul. To do that, it’s important to be strategic about retention, putting a plan in place to make them want to stay—even after their former schools re-open.
Why You Need to Perfect Your Retention Recipe

Retention is a cornerstone of financial sustainability

It’s no secret that enrollment and long-term financial sustainability are inextricably linked. Tuition dollars make up a large percentage of private and independent schools’ annual revenue—on average 70-80%, according to NBOA. In order to create financial stability for your school, it’s imperative that your retention initiatives are the main course—not a garnish. Protecting enrollment should be at the forefront of your mind, whether you sit in the business office, on the admissions team, or at the head of the school.

Attrition takes a toll on your school community

It can be difficult for teachers, students, and faculty to see members of your school family leave, especially when you work so hard to create a tight-knit community and strong campus culture. These types of losses can create an environment of uncertainty, leading others to consider leaving as well.

Ready to get cooking? This retention playbook lays out the steps needed to solidify a strong recipe for retention moving forward so you can lower attrition rates, increase sustainability, and meet your tuition and enrollment goals in the years to come.
How to Whip Up a Five-Star Retention Recipe
The secret sauce to strong retention is to ensure that it is fundamentally inherent to the school’s culture that attracting and retaining students is the responsibility of every single member of your school’s faculty and staff.

This is not just the job of the admission office, particularly after a student is enrolled, and incredible things happen for students and families when everyone who delivers the school’s mission every day – it’s faculty and staff – feels responsible for showcasing the school’s value proposition and ensuring that each student receives it.

It is much easier to enroll a student you already have in your community, and yet it is easy to become complacent and divert attention to bringing people in, rather than keeping the ones already there. Of course, schools should have a strategy that encompasses both, but starting with retention and always keeping it top of mind is key. One of the best ways I have seen this play out is to talk directly with families about the experiences they have inside the classroom and outside of it that make them feel valued and tied to the school’s mission. You may be surprised about what you learn a teacher does to support a student or check in with a family in his or her spare time that could become a best practice for all, or about the impact that someone in athletics has had on a struggling athlete. What can you learn from your school community that you could turn around and incorporate into your culture and programming to benefit all? Don’t wait until it’s too late, and remember, especially in times like these, while it comes down to daily customer service in many ways, keep an eye on longer-term strategy and vision when it comes to retaining mission-aligned families.”

Jennifer Osland Hillen, Chief Learning Officer, National Business Office Association (NBOA)

Finding the right recipe for retention at your school is much like mastering the preparation of any new dish: it helps to follow a few key steps. If you want to pull off a retention strategy that delights, it can’t be an afterthought or last-minute addition to the plate. You need to be intentional about your approach to retention and start your efforts the moment a family enrolls at your school. This is a chance to continue to connect and engage with your families in the same way you did throughout their admissions process.

Read on to learn about eight steps you can take to be proactive about retention success.
At Stanley, we know the most effective strategy around retention is really to focus on attracting and accepting mission-centric families who align with what you believe and will more likely embrace the different initiatives, curriculum, and programming you implement.

Retention efforts should begin the moment families join your community and be characterized by intentional communications and events throughout the journey, but they should also include organic and authentic high-touch outreach that engenders connection and a sense of trust. No one person can be responsible for retention, so employ a team approach and engage faculty to listen to their students and families about their experience and then share relevant updates with the retention team. This will allow you to support families and meet them where they are and connect them in meaningful ways with people and information that will help them make informed decisions around your school.”

Sumant Bhat,
Head of School, Stanley British Primary School

Retention begins with how your school is introduced to families and continues with how the community delivers.

Maintaining high retention begins with consistent community messaging with strong leadership in key positions. It’s an around the clock endeavor requiring all hands on deck.”

Lawrence Sampleton,
Associate Head of School for Enrollment Management and Financial Aid, St. Stephen’s Episcopal School
Before you can cook up a recipe for retention, you need to lay the right groundwork. In the kitchen, “mise en place” involves setting everything up for a night of cooking and finishing any prep work. At your school, the prep work for retention starts with strong and consistent communication and messaging that will help you attract and enroll mission-fit families. When you enroll families that are the right fit for your school culture and campus, you’ll immediately see families are more likely to stick around.

**Step 2:**

**Ingredients matter — gather the right team for the job**

Rik Dugan, Head of School at Princeton Academy of the Sacred Heart, recently shared on EMA’s Enrollment Spectrum Podcast, “One of the first realizations we had is that admission and retention are the job of everybody — not just one person. We decided to take an inside-out approach to empower our faculty, school leadership team, trustees, and families to help in this effort. It’s about the experience of families and it’s an ongoing process. We started a retention committee that includes the director of enrollment management, division heads, and head of school. This committee meets on a regular basis to discuss family situations proactively so we can be responsive, connected, and engaged.”

A five-star experience requires a team of highly skilled chefs working behind the scenes, each contributing their specialized knowledge to pull it off. Getting the right team of people to champion your retention efforts will make or break your initiatives and the long-term sustainability of your ideas. Breaking down departmental silos and bringing staff together isn’t always easy — but it is possible. Here’s who you’ll want to invite into your retention kitchen.

**CHEF’S TIP**

Make sure to earn buy-in from senior members of your school early on, including your principal or Head of School. Their support can make or break your committee’s success.
Who You Need in Your Kitchen

Chef de Cuisine/Executive Chef
*the big enchilada*

Your team needs a formal leader to drive your retention goals. Choose someone who is dedicated, reliable, consistent, skilled in managing teams, and someone who has the authority to make necessary changes.

Restaurant Manager
*your eyes and ears*

Include a few members with direct ties to students and parents, like your dean of students, division head, or res life director. They will serve as your eyes and ears into the everyday life of your families and can help enact your ideas. Their 1:1 connection with students and families will help them identify students at risk for leaving due to various reasons.

Flavor Developer
*strategic minds*

Get your admissions leaders, department heads, campus or res life director, and director of development on board to provide strategic insights on the student body as a whole. They can help identify overarching flavors or tones at the school.

Maître d’ and Sommelier
*message masters*

You need someone on your team to help get strategic messages out to the community at large in a cohesive, compelling manner. They’ll act as your “front of house” and will often serve as the frontline communications team, helping personalize the offering of your school to fit the individual needs of each family. This will likely be your director of marketing or admission professionals.
Step 2: Ingredients matter — gather the right team for the job

**Sous Chefs**  
*student specialists*

While you may not need faculty members to be regular meeting attendees, consider rotating a few teachers into your retention committee meetings to help identify new risks. Your teachers interact with students and families on a day-to-day basis and can provide valuable insight based on those experiences.

**Financial Guru**  
*revenue experts*

You need your business office to help you assess risks, provide insight on financial standings, and share the impact of your retention and attrition rates on school revenue. Involving your business office will help you paint a fuller picture of families’ experiences at every stage of their journey at your school.

**CHEF’S TIP**

Make sure everyone working at your school understands the importance of retention and their role in supporting it. Make an effort to continually educate them to recognize the signals that a student might be at risk of leaving and create a process to have them communicate the signal back to your team.
Turn up the heat by carving out clear goals and metrics for success

Once you’ve picked out the right team for the job, it’s time to turn up the heat and establish your goals and metrics. Determine what you’d like to accomplish as a team so you can better measure your success, as well as identify areas with room for improvement.

To start, you’ll want to be sure you have a clear picture of year-over-year attrition rate data. NAIS defines attrition as “the measure of students who could have returned to the school, but did not.”

If you’re new to calculating attrition, here’s the simple formula:

\[
\text{Attrition rate (\%) = } \frac{\text{Number of students choosing not to re-enroll}}{\text{Previous year’s enrollment}} \times 100
\]
Now that you know what your current baseline attrition rate is, you can get to work deciding what a reasonable goal is for your future state.

Make sure the goals you set are SMART (specific, measurable, attainable, relevant, and time-based) goals.

For example, “Our goal is to increase retention by 5% from the 2020/2021 to the 2021/2022 school year.”

Identify the key metrics or key performance indicators (KPIs) that you’ll use to gauge success. KPIs you should regularly track to meet retention goals may include:

- Retention rate
- Net promoter score (NPS)
- Student lifetime value (SLV)

You may also want to define a few objectives and key results (OKRs).

For example, “Our objective is to increase retention by 5% for the 2020/2021 school year; our key results are to get 80% of our families to our next level-up day, increase our NPS by 2, and have 1:1 meetings with 75% of returning families.”
Step 4:

Delve into data and analyze current trends

Self-awareness is extremely important; schools need a clear and honest understanding of who they are and their strengths and weaknesses.

Understand why families enroll at your school, why they stay, and what causes them to leave. Do not take anything for granted and consistently work to receive unbiased feedback about all parts of the school.

Retention is a school-wide effort and takes many different stakeholders to work. Anything that involves students and their families must be considered in retention efforts. It cannot just be the job of the admissions office. They are on the front lines but if they are not involved in the everyday running of the school, their ability to help keep students will be limited.

At Newark Academy, our Head of School meets several times a year with small groups of first-year students so that they may share their thoughts, impressions, and feedback with him. We also manage a possible attrition list throughout the school year and work to address emerging issues.”

Sam Goldfischer,
Director of Business & Finance, Newark Academy

To find out how to reach your retention goals, you’ll first need to get a better understanding of where you sit with current retention efforts at your institution. You’ve already calculated your baseline attrition rate, but now you need to gather all of your resources and take a closer look at past retention trends so you can develop more specific and relevant retention goals and a corresponding budget as a result.
Unsure of what resources you should be considering? Here are some key ingredients in a robust retention analysis:

**Find out what compels families to enroll at your school in the first place**
We mentioned earlier that retention begins before a family even enrolls, so this data point is particularly helpful. Ask families what the most important thing is for them in a school and why they’re specifically interested in your school during your admission process. The answers to these simple questions will help you understand what is truly important for families so you can continue to show them ongoing value that is unique to them.

**Exit surveys**
Do a deep dive into any exit surveys or interviews you’ve conducted with families who have left your school. Uncover exactly why students are leaving and where they went. Try to determine any trends or causes for families leaving. If you don’t yet have an exit survey, it’s absolutely critical that you incorporate one in your process. Some schools are even making the exit survey a requirement by adding verbiage to their contracts. When a family sits down with a school after choosing to leave, even if they were unhappy, they leave feeling heard and valued. Since it also gives your retention committee concrete feedback to identify the problem, you can work to solve it in the future. It’s a true win-win.

**Calculate the cost of attrition**
How much is attrition costing your school each year? Calculate the cost on an individual student level, as well as in aggregate based on current and projected attrition rates. Don’t forget: attrition doesn’t only impact revenue. It also increases your expenses because it will ultimately cost more to recruit and enroll new students to fill the gaps. You should also identify specific areas of attrition. Do you see higher attrition rates at certain grade levels or school divisions?

**Student + parent focus groups**
Create focus groups with your current families so you can discuss what’s working and provide space for them to voice their concerns or desires for changes. We’d recommend that you host two separate focus groups: one for parents and one for students. This helps you view your school from two different perspectives. The more you know about your families, the better you can serve them year after year. However, make sure that if you organize these groups, that you are willing to hear their honest feedback and ready to make changes based on what they share.

*Step 4: Delve into data and analyze current trends*
Track your NPS

If you’ve ever seen or answered the question “How likely are you to recommend us to a friend or colleague?” then you know what a Net Promoter Score (NPS) is. This simple question reveals just how loyal and happy your families and students are with their experience at your school. Scores are broken down into three categories: promoters, passives, and detractors.

- **Promoters**: these families give your school a score of 9 or a 10 in a survey. They are defined as enthusiastic and loyal customers who would not only return to your school but would also be likely to refer new families to your school.

- **Passives**: these are the families that give your school a score of 7 or 8. While they may appear neutral, it would be dangerous to assume they require little attention from you. These families are unenthusiastic, and perhaps even unimpressed. Because of this, they are open to other options and offers and may be easily persuaded to make a school switch.

- **Detractors**: these families evaluate your school and give a score between 0-6. They are notably unhappy, and could even be angry or heated. They are not likely to recommend your school. If left alone with no course correction, these families can actually damage your school’s reputation or brand through their active negativity.

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**CHEF’S TIP**

If you have any passives or detractors, consider adding them to an at-risk list so you are intentional about bringing them back into the fold. Figure out the source of their unhappiness or complacency, and then get to work building out a plan to address it. NPS gives you a chance to turn the experience around for a family before it’s too late.

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Step 4: Delve into data and analyze current trends
I have found success with running a short survey each quarter during the school year around the following: facilities—are they clean, do we have enough trash cans and recycling options; athletics and clubs—do we have enough offerings; guidance—are we providing enough support in all areas of student success, and finally for grades 9-11 asking “are you returning next year?

The committee then meets to discuss the results of each survey and follows up with students to talk about their responses. I have found that students value providing feedback and are generally surprised when they are followed up with by a member of the committee, but ultimately feel that their voice is being heard and the school cares about them.”

Steve Clement,  
Senior Director of Enrollment Management for the Archdiocese of Philadelphia

Gather data from your internal teams
Do you have a grade that is falling out of balance from a gender perspective? Do your facilities need an update? Did someone overhear a student discussing another school they recently toured? All of these questions, and more, can be answered by someone that works at your school—no one is as intimately familiar with your school as the people that work there. Not everyone feels comfortable bringing up the negatives, though, so it’s important to give your faculty and staff a pathway, like a google form they can submit, to voice their concerns as they arise. After all, it’s hard for your retention committee to correct an issue they never knew existed.

CHEF’S TIP
Create a Google Form for teachers and staff to submit concerns about students at risk. Ask for the teacher’s name, student’s name, the reason they think the student might be at risk (is it due to academic difficulty, financial concerns, a social issue, etc.), and how they learned about it. You can use the submissions to create an at-risk list and assign members of your committee to start a conversation with the family or check in on the student.
Delegate tasks so you can cook to perfection

“Making time for retention can be hard. One simple way to get around this is to carve out time during existing meetings.

I’ve heard from several schools who have made time during faculty meetings for ‘sunshine emails.’ These are simple communications from the advisor saying, ‘hello parent, just a quick note to let you know something cool I noticed about your child.’ Another way to do this without adding a burden on faculty is to have a smaller group of administrators or school leaders call every parent in the school in a given month. These calls have three effects: families feel cared for, teachers & administrators hear good news, and everyone has better context to understand real complaints (is this something everyone is saying... or just a few vocal parents?)”

Hans Mundahl,
Director of Professional Development, Enrollment Management Association (EMA)
Damien High School’s focus on new student onboarding and retention is supported by a dedicated team of juniors and seniors, known as Link Crew Leaders.

This student leadership team makes initial contact before school begins in the fall, plans and delivers our new student orientation, leads small group orientation activities, gives campus tours, and serves as “big brothers” to new students throughout the year with a series of academic and social check-in events.”

Carrie Birchler,
Director of Outreach Marketing, Damien High School

Once you’ve laid out your goals, uncovered current trends, and identified at-risk families, you need to decide who will be involved in tasks or initiatives and how to communicate. One way to do that is to define your plan for who is responsible, accountable, consulted, and informed (RACI). Determine who is...

- **Responsible:** Who will do the work?
- **Accountable:** Who is held responsible for the results?
- **Consulted:** Who has expertise or authority and should be involved in decision-making?
- **Informed:** Who needs to know the outcome of the decision/action?

Taking the time to complete a RACI will bring clarity and order to your projects and plans, leaving no room for important initiatives to fail due to a lack of ownership or communication. After all, the most successful retention initiative kitchen is one that is clean and orderly.
Step 6: Stay inspired and aligned in the kitchen

Rule #1 in a professional kitchen is to communicate effectively. You have to stay in sync with your team and continuously update one another on the status of your element of the menu so you can execute your dishes well. Your retention team needs that same level of communication. It will be hard to make progress towards your retention goals without meeting regularly and having a clear system in place.

Host retention committee meetings on a regular cadence, ideally bi-weekly, to discuss initiatives and give updates to your team. Be sure each session has a well-formed agenda and provide time to review performance, discuss issues, and assign future tasks. If you’re not on track to meet your goals, identify why and a new path forward so you can quickly course-correct. Checking in and seeing tangible progress can help everyone on your retention team stay motivated and aligned.

You’ll also want to establish a central location to gather your findings, reports, and important data. Even if it’s a central folder on a shared Google Drive. You also want to make it easy for teachers and staff members to share their findings or newly uncovered issues. One way to do that is to create a survey or google form for teachers to fill out so they can raise concerns. However you choose to share and gather your data, make sure everyone who should have visibility can easily access it, and everyone knows how to share information so you use it to direct future retention decisions.
Schools too often assume that families know what opportunities exist in future grades. My experience is that they not only lack accurate information, they often possess misinformation that seems to come from rumors or hearsay.

Parents and students usually know very little about the curriculum, special programs, and opportunities that lie ahead. It is important to consistently remind families that their initial choice of your school is and will continue to be a good one.

One way to do this is to remind and inform them how the experience for their child will evolve, grow, and expand as they move through the grades. It is also useful to share student successes and outcomes through data and stories to remind families that the potential outcomes they have invested in are still very achievable.

Being proactive with this marketing is far better than having to play defense after you learn that the family has begun looking at other schools. Schools tend to take for granted our current families and to forget that other schools will roll out the red carpet for them in the admission process. It is far better to consistently remind them of the good choice they made so they never go looking.”

Geordie Mitchell,
Assistant Head of School for Enrollment Management and Outreach, La Jolla Country Day School
Successful retention efforts need to be informed by a mix of quantitative and qualitative data. Predictive modeling for attrition will get you halfway there, but in order to get ahead of a family that might be thinking right now about leaving your school, you need to listen to the whispers.

All of Fay School’s Retention Committee meetings start with time for our division heads to share what they are hearing from kids and families. Similarly, our director of advancement will chime in about what has come up at Parent Association meetings. Our director of marketing and communications and I listen, take notes, and devise personalized outreach plans for families who might be at risk of leaving.

We also make a point in every meeting of sharing the upcoming communications calendar so we are all on the same page about messages families will be hearing from the school in the coming months, and together we adjust those communications if we identify a current need for certain information in our community. The best outcome of these meetings is that everyone leaves reminded that retention is not one person’s job and communication is key in order to stave off avoidable attrition.”

Beth Whitney,
Director of Admission, Fay School
Step 7: Execute the dish

You’ve done the hard work of preparing to cook your meal by gathering the right team in the kitchen, setting clear goals, assessing your current state, identifying trends, and dividing up the work among your specially curated team of chefs. Now it’s time to bring all of the ingredients together and execute your retention recipe.

Just remember that first and foremost, the recipe you’re so carefully preparing is for your families. You’re here to serve them and give each family a memorable and decadent experience at your school. To do that, you need to view communication as the foundation of your dish. Talk to your families, share news about upcoming events, opportunities, and programs, and continuously remind them exactly why they enrolled in the first place. Craft an intentional and holistic enrollment experience that spans the entire student journey, setting your school well apart from the competition.

Want to kick things up a notch? Here are some spices to experiment with to create a five-star retention recipe.
Here are a few ideas to spice up your retention approach:

**Level up and step up days**
Host level up, or step up days for returning students to get your families excited about the next grade. These are especially important for students moving to grades that are natural attrition points — like a move from middle to upper school. Get them excited about continuing their journey at your school by letting them meet their teachers, get an inside look at the next division, and build community before the new year even begins. Consider hosting these events a few times a year and make sure your events are lining up with competitive schools’ admission processes. You don’t want to host your events too late — your goal is to woo them to re-enroll before they’ve had a chance to taste-test the experience of another school. Remind families why they chose you and roll out the red carpet for current families in the same way you do for prospective families.

**1:1 meetings**
Another delectable retention idea is to host 1:1 meetings with your existing families. Often during the initial application process, parents get one-on-one access to you and other administrators. While it may not be feasible to have your Head meet with every new and returning family every year, consider planning these formal meetings occasionally as a part of your process to provide a personal experience and make sure families feel heard. You can also leverage your other administrators as well.

**Enrollment modeling exercise**
Think through what your community would look like at a smaller or larger size and what tangible parts of your community you would lose or gain — things like clubs, sports, electives, and faculty and staff members. Assign dollar values to each of these elements and ask your faculty and staff to identify what they would cut to meet budget goals if the school lost 1-3 more students, 3-5 more students, and so on. This can be a sobering exercise and help you gauge which elements of your school are crucial for success, or which programs or groups could be trimmed down if need be.
**Parent ambassador program**
Getting parents involved in an organized ambassador program is an excellent way to harness their unique power — and it won’t just benefit you during the enrollment process. They have the time, drive, and insider’s perspective to share with other families, helping others to feel like part of the fold. Involving parents also gives them a role to play and helps them feel like an important part of the community. When people feel valued, they stick around.

**Faculty workshops**
To be truly successful, you need everyone at your school to see retention as a whole school initiative. Host faculty workshops to educate teachers to recognize signals that a student may be an attrition risk, share opportunities and roles that are available to them, and gather case studies from them. Often teachers and faculty are the ones that will overhear a conversation or be involved when students are feeling out of place, or parents are unhappy with the school. Your faculty are a goldmine of information — don’t let it go to waste.

**Enrollment newsletter**
Share the results of your enrollment efforts with the teachers and staff at your school via a monthly newsletter. Unpack where you are at, share more about the health of the school, and bring them into your exciting news. Share when enrollments are up, inform them of new programs as they become available, and let them in on new admission, enrollment, and retention initiatives. You can also spotlight faculty members who have helped your admission and enrollment efforts. The more they know, the more connected they’ll feel to your enrollment and retention efforts, and the more aligned you will be as a school.

**Connect faculty and students**
If your school doesn’t already have an established advisor program, another way you might establish strong relationships between your teachers, staff, and students is to give faculty and staff a list of 2-3 new student profiles and have them connect or reach out a couple of times in the fall and spring. You can also create touchpoints throughout the year so they keep up. Having faculty make a special effort to remember students’ names and a few key facts about them can also help them feel at home at your school. If you already have an advisor program, designate one of their meetings each term to check-ins that are specifically related to retention efforts.
Celebrate birthdays
This is a simple one. Make a point to acknowledge every single student’s birthday throughout the year. Give them a hand-signed card from their teachers and your office. For students with birthdays outside of the school year, consider celebrating their half birthday, or send them a card during the summer or holidays. If you have a monthly community newsletter, you can add a section recognizing student birthdays. Recognizing each of your students can be powerful and incredibly meaningful to them. It’s a simple way to demonstrate just how much you care about each one of them.

Pictures speak louder than words
Parents want to see that their kids are enjoying their time at your school. Create social media spotlights by grade, or send parents pictures of their students hard at work or play once a week. You can also send out a newsletter with pictures featuring their children working on a science project, singing in the choir, or beside their completed art project. Is your school remote? Consider setting up a Zoom awards night or Google Hangouts recital. Do everything you can to actively demonstrate the continued and day-to-day value of your school to parents.

New student lunches
Host lunches in your admissions office and invite new students to hang out informally to extend your connection with them and help them feel like part of your school community from the get-go. If your school is still virtual — send new students a gift card or have lunch delivered to their homes and meet over Zoom. Provide time and space where you open up the floor and let them share their experiences entering into your school, tips or advice, and even any changes they would make. Showing your desire to learn from them and improve can mean a lot to the students and make them want to stick around for the long run. And their insights can help you avoid pitfalls for the next incoming class.

Personalized touchpoints
It’s also important to create personal touches along the journey for currently enrolled families in the same way you do for prospective families. Have multiple members of your community, like staff members, teachers, or a parent ambassador reach out and engage with families. If you know a specific family is interested in financial aid, include them in emails about options to help with school affordability or an upcoming financial aid info session for returning families. If they’re interested in trying out for the soccer team, have the coach give them a personal call. Those types of engagement shouldn’t stop after they enroll.
“Greet the students” assignments

Have your principal or a faculty or staff member stationed at the front entrance of your school to welcome students and parents in. This could be a daily, weekly, or monthly occurrence. A simple greeting can show you care about these students and give families another familiar face to see around your campus.

Set up special financial aid funds + offer financial aid nights

Work with your business office to offer special financial aid assistance in times of emergency — whether that be a pandemic, natural disaster, or other hardship. Setting up extra help and addressing financial concerns for families in difficult seasons can go a long way and ensure they return to your school. These funds don't have to be years long, they may be a one-time gift, but lending a hand to families will give them time to bounce back. You could also host financial aid nights and invite returning families who have voiced a need for some extra financial help.

Offer parent volunteer opportunities

Offer volunteer opportunities at your school to get parents and the whole family involved. Have parents sign up to chaperone a field trip, bake goodies for your next awards night, or help out with special campus events and activities. When parents are involved in the day-to-day experiences at your school, they will grow to love it even more and continuously be reminded that they are truly a part of what makes your school so great.

Student journey mapping

Have you mapped out the entire journey of a student at your school from inquiry to applicant, enrolled, and their time as an alumni? Make sure you're connecting with your families at every stage of their journey at your school. Your retention efforts should begin and end where a student's journey does. Once you've mapped out the full journey of a family at your school, you can see where there's room for you to make their experience even better and where you need to include more targeted retention efforts.
School outreach or community days
You can even get the whole family involved by planning a school outreach day where you volunteer to do good as a school. You can work with a local charity or organization to clean up your town park, plant flowers at a retirement home, or make meals for the homeless. Hosting a whole school outreach day can bond families and give everyone a sense of shared purpose. It’s a great way to get everyone involved in your school community.

Parent book clubs
Give parents a way to connect and form genuine relationships. Host a book club — either in person or virtually and read a parenting book, bestseller, or a new book that is relevant to your school’s mission and core values. Bonus points if the group is led by your Head of School. You can also invite other key administrators to participate. Not only will parents feel more connected to one another, but they’ll also get to see firsthand what your school cares about and have something in common to talk about with every family in the book club.

Big/lil (veteran/newbie) parent pairings
Start a program that gives new enrolling families the option to be paired with a current family whose child has been at your school for a few years already. That way, your returning families can share their knowledge and insight on school events and practices with new families in a casual, personal manner, and new families can ask questions to a family who has been in their shoes before.

Ways other industry experts are spicing up their retention approach:

*Link Crew is a program of the Boomerang Project and our students have benefited greatly from their innovative programming that has evolved with the dynamics of remote learning and digital meetings.*

*This year, one of our Link Crew Leaders took the initiative to develop and deliver a peer tutoring program to connect juniors and seniors with freshmen, further enhancing the support available for and strengthening the bond with our first-year students.*

Carrie Birchler,
Director of Outreach Marketing, Damien High School
In the spring of each year, we provide our 8th-grade students and parents, many of whom learned only about the Middle School in their initial school search process, with a mini Upper School open house type event to help them learn more, ask questions, and voice concerns.”

Sam Goldfischer, Director of Business & Finance, Newark Academy

There are a couple of ways the business office can support retention efforts, specifically for financial aid families.

One way is to run a report of all financial aid applicants that received aid in the 20-21 year against all returning applicants that have applied to date. For those that have yet to begin an application for 21-22, send out a personalized message to encourage them to complete the application. Then you can share that list with your admissions team so they can track those that have yet to apply but should apply for aid. If they don’t, it could be an indication the family might not be returning for the following year. You can also run a report of all “slow pay” families this year and share that list with the financial aid director at your school. This can help you confirm that you aren’t stretching a family too far during financial aid assessments. It can also provide an indication that they may need more aid next year. These are all bits of information that can help you during the awarding process to ensure you award fairly in difficult times.”

Alisa Evans, Founder & Managing Partner, Mission Enrollment Strategy Solutions, LLC
Public displays of learning help parents feel bonded to the teachers and school who made these spectacular moments possible.

These events have the power to convey the essence of your brand, your “it” factor, and the special sauce that makes your school distinct among peer schools. Now that many things are remote, parents and even grandparents can attend virtual events like award nights or book report days—connecting families deeply to your school in a way that’s meaningful to them.”

Jill Goodman,
Private School Consultant, Mentor & Strategist

At Darrow School, we have established a retention team to address student or family concerns.

We maintain a spreadsheet that includes a list of all possible returning students. We make specific notations in various categories (academic, financial, discipline and other) for those who show signs of leaving or cause concern, we can track and reflect those concerns. Then, if there are opportunities for intervention, we try to manage that prior to the issuance of the contract.”

Kristen Kaschub,
Director of Admissions and Enrollment Management, The Darrow School
The work of enrollment management entails projecting, strategy, versatility, insight, foresight, collaboration and a certain amount of luck.

As admission professionals, we tend to focus on cultivating the next stellar students to our schools however, to fully ensure the future financial sustainability of our schools, we should focus ample energy on not just retaining our students but creating a loyal fan base. We should focus on creating lasting experiences and memories both in and outside of the classroom. Are our students and parents forever fans of our school? What will make the deepest impact? Perhaps it is a highly anticipated annual, campus event, an experiential learning opportunity, a connection with an English teacher or a residential faculty member, or a challenging, cross-curricular assignment but the end goal should be about creating a lasting impression. Maybe we should consider pulling back the curtain and allowing our students to experience the “human side” of our schools and their teachers, instilling a deeper level of connectivity. Enrollment management encompasses the entire range of the relationship, from the initial introduction of the school to a family, to a celebratory hug of congratulation at graduation and a meaningful text or call, to time as an alumni. The meat and potatoes of the relationship is what the student experiences while attending the school. Trust, connectivity, experience, and outreach are the pillars of retention.”

Kila M. McCann,
Dean of Admission & Financial Aid, The Bolles School
Cook, fail, tweak, repeat

You likely won’t come up with a flawless recipe for retention your first time around. That’s ok. The best dishes are always perfected over time. Every time you try something new and fail to see major results, you can tweak your approach and get closer to optimizing your retention strategy. Pioneering chefs are always pushing ahead — so don’t be afraid to try a new idea or do something different. You may just hit the jackpot and find you’ve created a masterful retention recipe — but you can’t get there without some experimentation.

Cooking with the Right Utensils

Using a few handy tools in your retention kitchen can take your approach from meh to Michelin star worthy. Ideally, you want an enrollment management platform that can help you manage the entire experience of your families and students from inquiry through enrollment and even re-enrollment to cover their complete journey.

The right tool will offer the following to help you cook up retention success:

<table>
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<tr>
<th>A family-friendly interface</th>
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<td>Don’t underestimate the importance of a friendly user interface and positive user experience when choosing your enrollment management platform. This is the system your families will be interacting with each year when they sign contracts, make tuition payments, and submit forms. It’s valuable to choose a tool that is easy for families to navigate, mobile-friendly, and visually appealing.</td>
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<th>Easy reporting + retention data</th>
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<tr>
<td>Finalsite’s Admissions and Enrollment software calculates retention rates for you and prominently displays the data so you can keep an eye on changes. It’s also easy to compile important data and run reports to uncover current attrition trends and identify your at-risk families. You can even save specific reports for reference and compare them across months or years to track progress.</td>
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Ability to create custom fields to track NPS/account health

With Finalsite's admissions and enrollment software, you can create custom fields to track things like NPS and account health. You can also track who owns retention outreach for each student to divide and conquer amongst your retention team.

Detailed internal notes

The notes and data on each student's profile in Finalsite's admissions and enrollment software let you track a family's journey over time. In addition to NPS, you can also track specific issues and concerns that have been uncovered so you can correct it. Having a central record for all of these interactions lets you craft a memorable experience for families for years to come.

Personalized and automated communication

With personalized communication and email capabilities you can easily reach out to families so you can stay in contact, schedule 1:1s, invite them to level-up days or gather their feedback in an end-of-year survey. Finalsite's automated communication plans let you scale the efforts of even the smallest offices so you can create a rave-worthy experience for every family.
Keep cooking and innovating

Developing a retention strategy is no simple task. But with all of the ingredients you need to cook up an award-winning retention strategy and your creativity, focus, determination, and heart — you can carve out a unique path to reduce attrition and provide long-term sustainability for your school. You know how to woo new students, and with a retention strategy in place, you can continue to woo families day after day, month after month, and year after year. When you invest fully and devote yourselves to continue to try new ideas, innovate, and work together as a committee and school as a whole you can cook up a one-of-a-kind recipe to meet all of your enrollment, budget, revenue, and retention goals. And you'll likely create a closer, stronger, tight-knit school community along the way.

About Finalsite

At Finalsite, we believe in the power of education. This fuels our mission — to help schools prepare students to be successful and make the world a better place.

Strong family engagement is linked to increased student achievement, social emotional skill development, and better student outcomes. That's why we've developed software, services and a thriving network of people — to transform the way communities engage with their schools.

Learn more at
www.finalsite.com
15 Mouthwatering Recipes For Retention Success

[Cheat Sheet]

Spice up your retention approach to reach your goals and increase retention starting today.

- **Recipe #1:** Host level up or step up days to get existing students and parents excited about continuing their journey with your school, meet their new teachers, and build community before the new year even begins.

- **Recipe #2:** Set up 1:1 meetings with parents of current students to provide a personal experience and make sure families feel heard.

- **Recipe #3:** Create a parent ambassador program to harness the unique power of your parents. Give them a role to play and help them share their perspective with prospective families.

- **Recipe #4:** Plan faculty workshops to help teachers recognize signals that a student may be an attrition risk, share opportunities and roles that are available to them, and gather case studies from them.

- **Recipe #5:** Send out an enrollment newsletter to bring teachers and staff into your exciting news, inform them of new programs, let them in on new admission, enrollment, and retention initiatives, and spotlight faculty members who have helped your admission and enrollment efforts.

- **Recipe #6:** Celebrate birthdays by giving students a hand-signed card from their teachers and your office. It’s a simple way to demonstrate just how much you care about each one of them.

- **Recipe #7:** Pictures speak louder than words. Parents want to see that their kids are enjoying their time at your school, send them pictures to show them the continued and day-to-day value of your school.
Recipe #8: Host new student lunches in your admissions office and invite new students to hang out informally and share more about their experiences or any changes they would make. If your school is still virtual- send new students a gift card and meet over Zoom.

Recipe #9: Start “greet the students” assignments where your principal or a faculty or staff member is stationed at the front entrance of your school to welcome students and parents in.

Recipe #10: Set up special financial aid funds and offer financial aid nights to give families extra help in times of emergency and address financial concerns in difficult seasons.

Recipe #11: Have parents sign up to chaperone a field trip, bake goodies for your next awards night, or help out with special campus events and activities to get families involved in the day-to-day experiences at your school.

Recipe #12: Start a parent book club to help parents connect and form genuine relationships. Bonus points if your group is led by your Head of School.

Recipe #13: Organize a school outreach or community service day for everyone at your school where you clean up your town park, plant flowers at a retirement home, or make meals for the homeless.

Recipe #14: Continue to offer personal touchpoints for enrolled families. Have staff members, teachers, or a parent ambassador reach out and engage with families and share upcoming event information or a coach give them a personal call if they’re interested in a new sport.

Recipe #15: Invest in a tool that displays your current retention rates, offers easy reporting options, allows for personalization, and is user-friendly for your families.

Reach out to the Finalsite team to learn more about how our tools can help you increase enrollment and retention at your private school.