

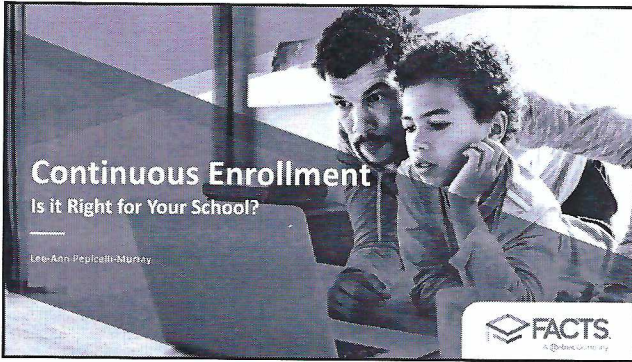


Advancement and Leadership
Services for Catholic Education

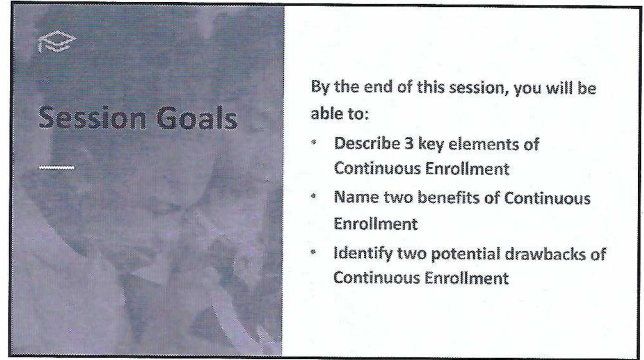
Session EM 215
***Continuous Enrollment—Is it
Right for Your School?***

PowerPoint Presentation

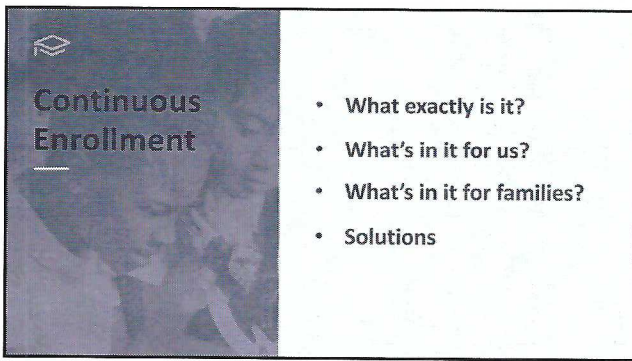
***The National Enrollment Management
Conference for Catholic Schools***



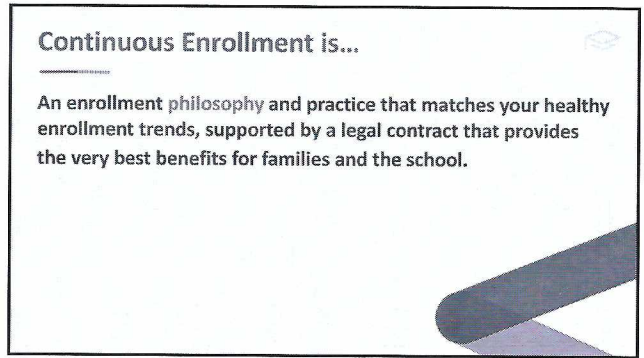
1



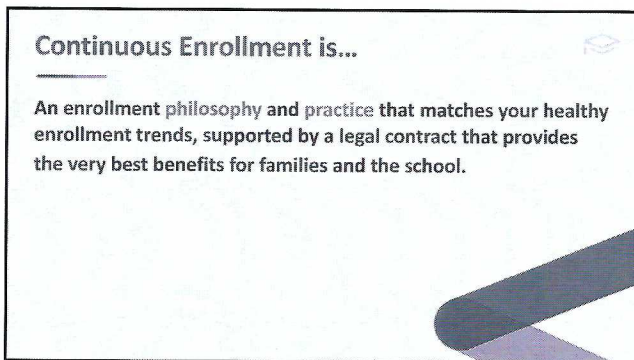
2



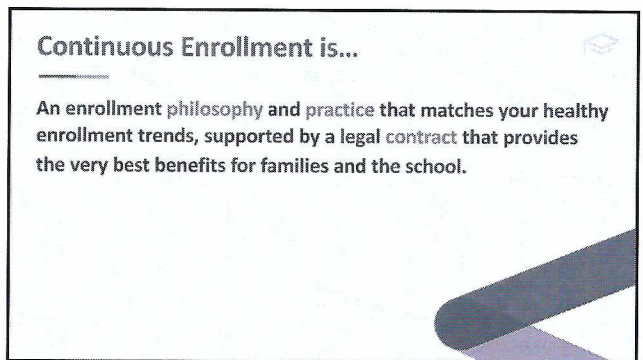
3



4



5



6

Historical Enrollment Models

PUBLIC SCHOOLS	HIGHER EDUCATION	K12 SCHOOLS
TRADITIONAL ENROLLMENT	CONTINUOUS ENROLLMENT	ANNUAL REENROLLMENT

7

Enrollment Practices Side by Side

Similarities:

- Expected enrollment thru graduation.
- Guidelines and Partnership Terms are acknowledged and agreed to upon enrollment
- Tuition, fee, and course schedules published annually.

HIGHER EDUCATION	K12 SCHOOLS
Terms by semester	Terms by academic year
Withdrawal notification not necessary	Withdrawal notification is necessary
\$ Terms are clear and strictly enforced	\$ Terms are often soft and not always enforced

8

Anatomy of the Continuous Enrollment Contract

- Agreement to pay tuition and fees for current year and future years through graduation
- Guarantees a seat through graduation
- Informs the annual publication date for updated tuition/fees/courses
- Details the annual opt-out time frame
- Details the charges for late opt-outs and includes any financial aid award clauses, etc.

9

Gym Chain	Initiation Fee	Annual Fee	Monthly Cost
24-Hour Fitness	\$50	\$50	\$47
Anytime Fitness	\$50		\$39
Lifetime Fitness	\$80	\$50	\$30
Planet Fitness	\$5	\$30	\$10
Snap Fitness	\$50	\$20	\$50

Billed every month, until you cancel.

10

Anatomy of the Opt-Out

- Agreement to pay tuition and fees for current year and future years through graduation
- Guarantees a seat through graduation
- Informs the annual publication date for updated tuition/fees/courses
- Details the annual opt-out time frame
- Details the charges for late opt-outs and includes any financial aid award clauses, etc.

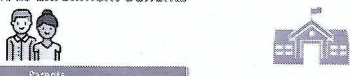
11

Continuous Enrollment Benefits

Parents

12

Continuous Enrollment Benefits



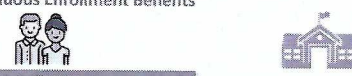
Parents

One and Done - No need to keep re-enrolling every year - We're in until we graduate!

13

13

Continuous Enrollment Benefits




Parents

One and Done - No need to keep re-enrolling every year - We're in until we graduate!
Less stress regarding contracts and deadlines.

14

14

Continuous Enrollment Benefits



Parents

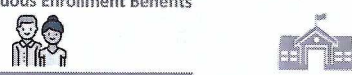
One and Done - No need to keep re-enrolling every year - "We're in until we graduate!"
Less stress regarding contracts and deadlines.

Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents!

15

15

Continuous Enrollment Benefits



Parents

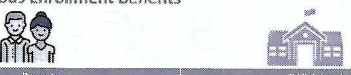
One and Done - No need to keep re-enrolling every year - We're in until we graduate!
Less stress regarding contracts and deadlines.

Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents!
Guaranteed seat through graduation, assuming all expectations are being met - preferential status

16

16

Continuous Enrollment Benefits

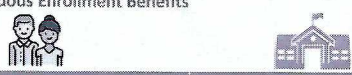


Parents	K-12 Schools
<p>One and Done - No need to keep re-enrolling every year - We're in until we graduate! Less stress regarding contracts and deadlines.</p> <p>Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents! Guaranteed seat through graduation, assuming all expectations are being met - preferential status Provides a positive message - "Once a Lion, Always a Lion"</p>	

17

17

Continuous Enrollment Benefits




Parents	K-12 Schools
<p>One and Done - No need to keep re-enrolling every year - We're in until we graduate! Less stress regarding contracts and deadlines.</p> <p>Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents! Guaranteed seat through graduation, assuming all expectations are being met - preferential status Provides a positive message - "Once a Lion, Always a Lion"</p>	<p>Matches your parent's enrollment practice - which is to remain year after year until graduation</p>

18

18


Continuous Enrollment Benefits



Parents	K-12 Schools
One and Done - No need to keep re-enrolling every year - We're in until we graduate! Less stress regarding contracts and deadlines.	Matches your parent's enrollment practice - which is to return year after year Spend much less time processing enrollment as over 90% return - just deal with those not returning
Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents! Guaranteed seat through graduation, assuming all expectations are being met - preferential status Provides a positive message - "Once a Lion, Always a Lion"	Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents! Guaranteed seat through graduation, assuming all expectations are being met - preferential status Provides a positive message - "Once a Lion, Always a Lion"

19


Continuous Enrollment Benefits



Parents	K-12 Schools
One and Done - No need to keep re-enrolling every year - We're in until we graduate! Less stress regarding contracts and deadlines.	Matches your parent's enrollment practice - which is to return year after year Spend much less time processing enrollment as over 90% return - just deal with those not returning
Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents! Guaranteed seat through graduation, assuming all expectations are being met - preferential status Provides a positive message - "Once a Lion, Always a Lion"	Earlier enrollment commitments improve budget forecasting and planning

20

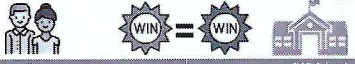
Continuous Enrollment Benefits



Parents	K-12 Schools
One and Done - No need to keep re-enrolling every year - We're in until we graduate! Less stress regarding contracts and deadlines.	Matches your parent's enrollment practice - which is to return year after year Spend much less time processing enrollment as over 90% return - just deal with those not returning
Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents! Guaranteed seat through graduation, assuming all expectations are being met - preferential status Provides a positive message - "Once a Lion, Always a Lion"	Earlier enrollment commitments improve budget forecasting and planning Reallocate time and energy to focus on school growth

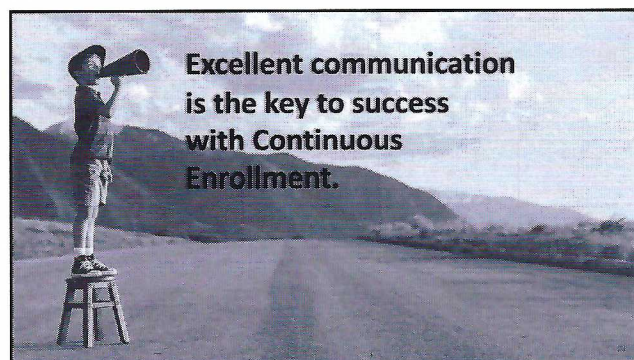
21

Continuous Enrollment Benefits



Parents	K-12 Schools
One and Done - No need to keep re-enrolling every year - We're in until we graduate! Less stress regarding contracts and deadlines.	Matches your parent's enrollment practice - which is to return year after year Spend much less time processing enrollment as over 90% return - just deal with those not returning
Usually not required to pay re-enrollment fees every year - this is a POSITIVE reward for loyal parents! Guaranteed seat through graduation, assuming all expectations are being met - preferential status Provides a positive message - "Once a Lion, Always a Lion"	Earlier enrollment commitments improve budget forecasting and planning Reallocate time and energy to focus on school growth

22



23

Communication is Key!

- ✓ Use Positive Messaging
- ✓ Parent Centric Messages
- ✓ Communicate often and vary method
- ✓ Anticipate confusion and objections and address those issues winsomely from the beginning
- ✓ Use key stakeholders as voices
- ✓ Repeat your message often with fresh delivery:
 1. Big picture
 2. Next Steps
 3. Deadlines

24

Continuous Enrollment Planning & Execution Year 1 versus Future Years

Summer - Fall New CE agreement drafted by HOS & legal advisor; Board/Pastor approves

Nov-Jan School begins communicating to parents about launch of CE
CE Promotion Campaign (i.e. website, handbooks, video, faculty, PTO)

Jan-Feb Parents Sign CE agreement through online re-enrollment; Opt-Out Time for families (continue promoting)

Mar 15 Bill Enrollment/Tuition Deposit Fees via Billing Platform (will remind parents of Opt-Out)
All NEW students will sign their CE Agreement in their online enrollment forms

FUTURE YEARS Only new students will need to sign the CE agreement. Continue to communicate WELL to current parents EVERY year to remind them they are Continuously Enrolled, but they have an Opt-Out period to exercise with a procedure and deadline.

Mar 1-15

- Quick global edit marks all current students reenrolled and updates dashboard
- Students who opted out are marked withdrawn for upcoming year
- Bill Enrollment/Tuition Deposit Fees via Billing Platform

25

Sample Communication Timeline to parents

Late Fall or January HOS email: Describe new CE Philosophy, Big Picture & Positive Messaging (use storytelling) – Post on website with FAQ, dates on school calendar, include a video!

January HOS or Admissions additional email to include:

- How-to steps for completing CE for families this year vs. next year
- Tuition and fees posted
- Incentive to complete it by the due date (discount or late fee)
- Opt-out instructions; in Family Portal, or email to whom, or form sent to whom

Every 2 wks Reminder email; consider a variety of ways to communicate with parents (email, Parent Alert, snail mail, phone call; but only contact those who have not yet responded)

Feb 20 Final Email Reminder that there is 1 week remaining

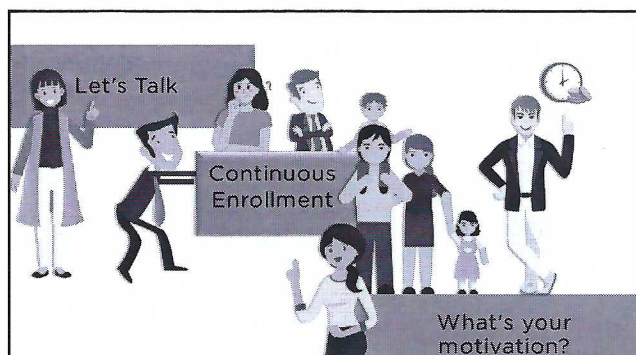
Feb 28 Opt-Out Deadline (Enrollment Form due with signed CE contract for the last time)

Mar 15 Non-Refundable Enrollment Fee/Tuition Deposit billed

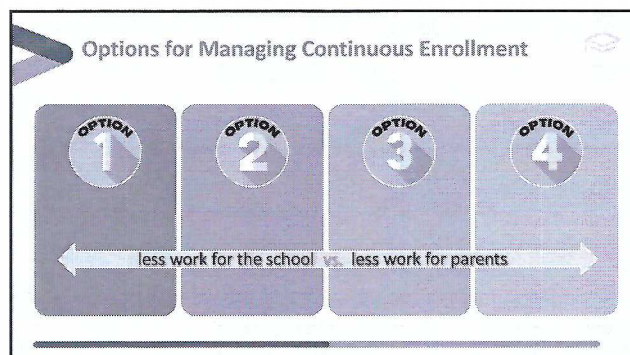
Jan-Mar Have a structured follow-up plan as parents opt-out

Jan-Aug Newly accepted students will complete CE agreement in their enrollment form

26



27



28

CE Using "Back to School" Forms

OPTION 1

Re-enrollment Make bulk status changes in your SIS

Online Forms

- Refer to your system enrollment forms as "Back to School" packet
- Send in late spring or summer

Family Updates

- Simple way to get updated family info
- Includes document uploads, forms, etc.

Managing

- Easy to track who has completed
- Easy to send reminders to complete

29

CE using SIS Forms

OPTION 2

Re-enrollment Make bulk status changes in your SIS

Family Updates

- Utilize SIS Platform Forms
- Update demographics, contacts, pick-up, etc.

Other Forms

- Utilize Google or Microsoft Forms to collect data
- Send fillable pdf docs, etc. via email (surveys, medical)

Managing

- More labor intensive to request and track responses
- More difficult to "require" parents to respond

30

CE w/o Forms, School Manages Updates OPTION 3

Re-enrollment	Make bulk status changes in your SIS
Family Updates	<ul style="list-style-type: none"> School updates family info as you hear throughout the year Families are not required to update forms
Other Forms	<ul style="list-style-type: none"> Utilize Google or Microsoft Forms to collect other data Send fillable pdf docs, etc. via email (surveys, medical)
Managing	<ul style="list-style-type: none"> Much more labor intensive for the school Burden is on the school to update information

31

CE Alternative: SIMPLIFY Your Enrollment Process OPTION 4

New Student vs Returning Student Forms	Returning families are given a more streamlined form.
Exclude for Returning Students: Social Security, birth certificate, race, ethnicity Siblings, Grandparents, Alumni Records request Media Release, Acceptable Use Policy Some Acknowledgements and Agreements Payment Plan step	

32

CE Alternative: SIMPLIFY Your Enrollment Process OPTION 4

New Student vs Returning Student Packet	Returning families are served a more streamlined packet.
Incorporate online forms	Utilize digital forms or fillable PDF that do not require parents to print and upload.

Convert with a PDF fillable form generator (Adobe).
Eliminate the need for printer & paper.
Young parents love to use their thumbs on phones!

33

CE Alternative: SIMPLIFY Your Enrollment Process OPTION 4

New Student vs Returning Student Packet	Returning families are served a more streamlined packet.
Incorporate online forms	Utilize digital forms or fillable PDF that do not require parents to print and upload.
Move to Family Based Enrollment Forms	One form per family. Includes all children and a consolidated fee payment.

34

CE Alternative: SIMPLIFY Your Enrollment Process OPTION 4

New Student vs Returning Student Packet	Returning families are served a more streamlined packet.
Incorporate online forms	Utilize digital forms or fillable PDF that do not require parents to print and upload.
Move to Family Based Enrollment Forms	One packet per family, includes all children and a consolidated fee payment.
Financial Integration	Provide parents ability to enroll AND set up a tuition payment plan in one transaction.

35

CE Alternative: SIMPLIFY with FAMILY based Forms OPTION 4

SAVES TIME	Parents with multiple children have a streamlined experience.
ONE PACKET	ONE packet includes all children
ONE FEE	Single enrollment transaction for the whole family

36

You have CE OPTIONS:
Which will be best for your school?

OPTION 1
Back to School Enrollment Forms in Spring for SIS updates and all forms needed

OPTION 2
SIS Forms – School emails for everything else and manually enters SIS data for every student

OPTION 3
School emails for everything and manually enters SIS data for every student

OPTION 4
Forget CE
Utilize Family Forms and/or Streamline Returning Student Packets

37

Let's stay in touch!

Lee-Ann Pepicelli-Murray
Technical Sales
lpepicelli-murray@FACTSmgt.com

38