SchoolMint

Reimagining the PreK-12 School Enrollment Experience

Guide to Strategic Enrollment Management for School Districts

Foreword by **Dr. Peter Gorman** | Managing Director of Academies, Atlantic Research Partners and Former Superintendent of Charlotte-Mecklenburg Schools

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Foreword

In my 30 years as a K–12 educator, administrator, and leadership coach, I have seen a remarkable shift in how families engage with their local school systems. The days when families passively accepted school assignments based on where they live are behind us. An increasing number of public school districts are empowering families to make active decisions about the best-fit schools and programs for their children.

In the face of expanding open enrollment policies and a proliferation of charter and magnet school programs, enrollment strategy has become a core district competency — vital to not only equitable family access and participation, but also to healthy district operations that support student success. In my work developing K–12 district leaders, there is growing demand for a national conversation about enrollment as a high-stakes process with deep implications for a district's ability to attract, educate, and retain diverse families.

SchoolMint's **Reimagining the PreK–12 School Enrollment Experience** comes at a critical moment as district leaders face this new frontier. The paradigm presented for strategic enrollment management goes far beyond mere enrollment forms to reshape a district's entire approach to family-school interactions, year-round. Each chapter provides timely, actionable guidance to district leaders to inform key aspects of their enrollment management policies, strategies, and tactics.

There is no one silver bullet for districts seeking to expand access to and interest in their schools. However, adopting a coherent, end-to-end approach to strategic enrollment management is an essential step forward for K–12 public schools.

Dr. Peter Gorman

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Introduction to Strategic Enrollment Management

With default neighborhood public school assignments on the decline and families increasingly able to choose their child's school from among multiple options, the need for public school systems to ensure equitable access to high-quality education options has never been greater.

As school options expand and communities around the country are demanding a more transparent and inclusive enrollment process, the stakes are only getting higher. To meet this demand, forward-thinking district leaders now recognize that the concept of enrollment is a much more holistic experience than simply registration.

Strategic enrollment management (SEM) is an ongoing, deliberate approach to choice and engagement that higher education has been following for years. It starts before enrollment even begins with marketing and outreach, transitions into applications and registration, and continues throughout the school year, with ongoing family engagement that spans a student's entire time attending school in the district.

OUTREACH

APPLICATION

REGISTRATION

RETENTION

SEM requires a philosophical shift and a sustained leadership commitment to rethink the entire enrollment experience, which begins with a family's first interaction and continues throughout their "lifetime" with the school system.

Transitioning to a strategic enrollment process can be a challenge for public school systems, but the stakes are too high to ignore or delay.

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The High Stakes of Enrollment

Brand and reputation

With increasing choice and competition, school systems have to differentiate themselves and provide high-quality experiences for families, students, and staff

Inclusion and access

Equity and access throughout the enrollment process ensures diverse student bodies and fair practices for families.

Financial sustainability

Forecasting, optimizing, and balancing enrollment demand across schools is a critical budget lever.

Family engagement

Families form their first impression of your district and schools during the enrollment process.

Operational effectiveness

Real-time enrollment data is critical to informing decisions about operational, logistical, and facilities planning and execution.

Responsive, hIgh-quality programs and outcomes

The right data enables you to monitor relative demand for schools and programs and determine which ones to replicate and which to reconsider.

How to use this guide

Reimagining the PreK–12 School Enrollment Experience is designed to help provide school systems with a roadmap and real-world insights about how to effectively select, design, implement, and evaluate a holistic enrollment system that is transparent and equitable. This guide focuses on outreach, school selection, application, and registration. Future editions of the guide will explore student retention and ongoing family engagement.

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Design & Governance

Every city and school district is unique, with its own student population, socioeconomic and political landscape, budget and operations, and community relationships. Your enrollment system needs to be just as unique as your district.

Take the time to define your needs, and enlist a cross-section of stakeholders to work together to determine the scope, policies, protocols, and processes that will define the new system.

PRIMARY CONSIDERATIONS

- Define the problem your city or district needs to address with the new enrollment system.

- Understand which enrollment strategies would best address the problem you need to solve.

- Take your time with a thoughtful design process, and involve a cross-section of stakeholders to define the requirements, processes, and governance.

- Describe what success will look like for your new system, and document it.

- Identify who will be responsible for administering the new system.

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What is the specific problem we are trying to solve?

To ensure that you have the requirements in place for your new system, start out by defining the issue or issues that must be addressed by the new system and craft a "problem statement." This isn't just a critical first step — it's also a way to keep everyone focused throughout the design, implementation, maintenance, and evaluation of the system.

Below are some common enrollment issues that districts have used as a basis for problem statements:

↘ **Higher-risk populations lack equitable access to school options because they don't have the time, resources, or know-how for finding school information.**

↘ **Some families are unaware that they have a choice in which school their children attend.**

↘ **Families don't have sufficient information about their public school options.**

↘ **Misaligned application timelines and separate school-based applications fuel parent confusion and limit choice.**

↘ **Transparency and trust in the lottery and student assignment process are lacking.**

↘ **Mid-year transfer students have limited school options.**

↘ **Schools can't track interest or predict enrollment, which creates challenges with budget, communications, and capacity.**

↘ **There is an overwhelming amount of paperwork and administrative overhead.**

AVOID THIS PITFALL

Don't attempt to solve problems you don't have. That may sound intuitive, but it can be easy to lose focus. For example, if you're looking to improve families' enrollment experience, yet supply and demand are fairly balanced, consider a common timeline or common application rather than a combined lottery. That way you can coordinate information and processes to make enrollment easier for families without reinventing the wheel.

To create your problem statement, identify the issue that is most important to address in your school district, and craft a statement that specifically describes the issue that you can use as the focus for the work. If there are multiple issues, begin with the one or two most critical problems and build in a plan to address the rest in future years.

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What type(s) of enrollment strategy could address the problem we need to solve?

Refer back to your problem statement. Depending on the issues you most need to address and the complexity and urgency of them, you can incorporate one or more of these strategies — listed here from most straightforward to most comprehensive—to transform the enrollment experience:

Coordinated marketing and outreach

Consolidate detailed, consistent school information into one central online location that's easily accessed, and make print guides available as an alternative. Synchronize community outreach such as expos, advertising, and direct messaging campaigns across schools when possible.

Common timeline

Develop one simple timeline for the school application process across the entire system. Each school continues to run its own enrollment processes, but all schools are aligned on the same dates for applications, lotteries, offers, and offer acceptance.

Common application

Participating schools all use one system-wide application and one efficient, transparent application process that includes a common timeline. Each school continues to run its own assignment process, offers, and offer acceptance.

Common enrollment

All students apply to multiple schools with their ranked preferences through a system-wide application. Administer one common lottery that adheres to each school's enrollment prioritization policy using an automated algorithm for one single, optimized school "match" for each student.

Common year-round processes

Follow one unified set of protocols for enrollment, transfers, and withdrawals across all schools throughout the year. New students and transfer students have the same opportunities to access schools that enrollees had at the beginning of the year, and schools have consistent expectations for maintaining their funded enrollment levels.
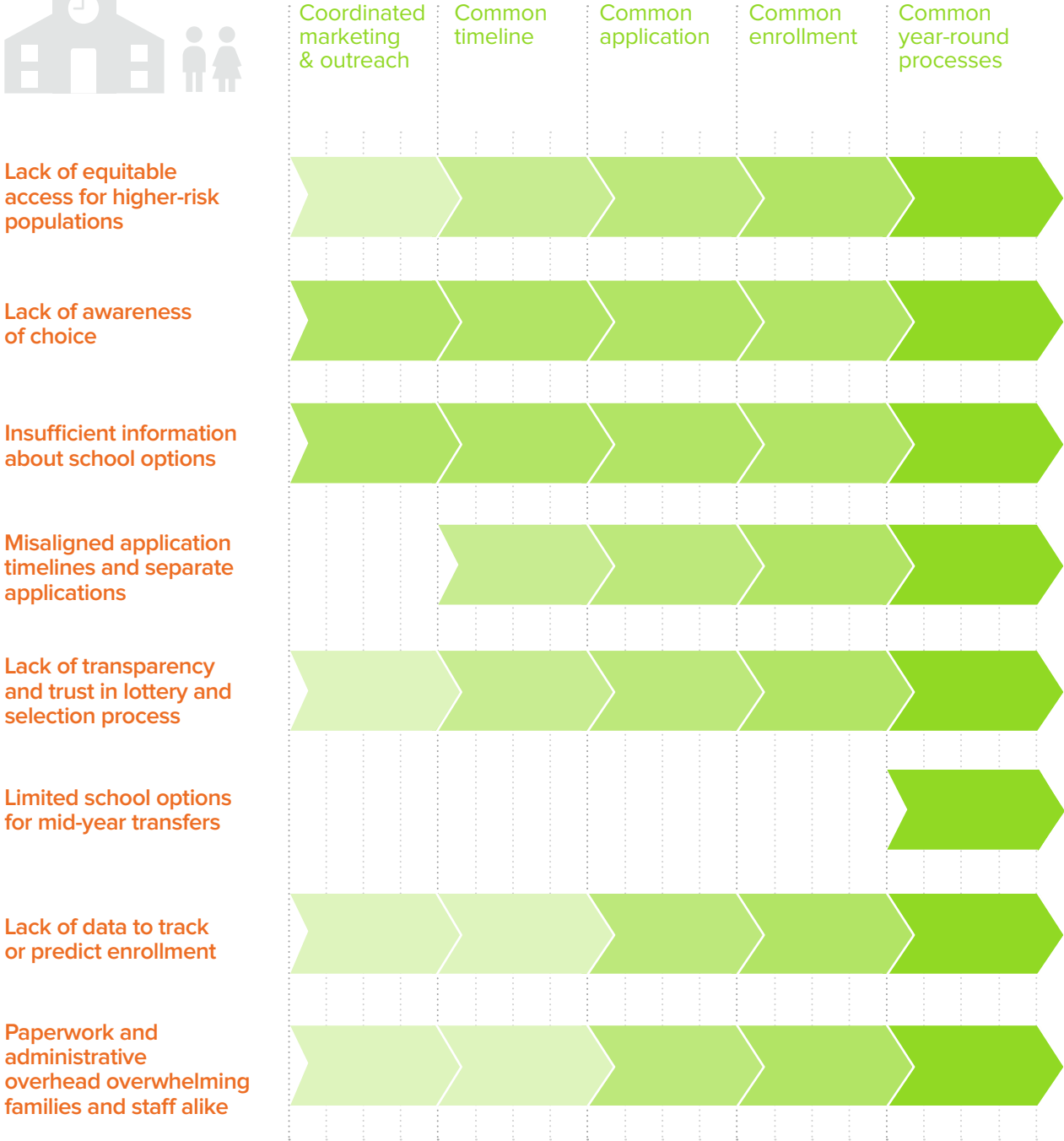
Year-round processes

Denver Public Schools
Denver, CO

When DPS implemented their common enrollment system in 2011, they wanted (1) all schools to share equitably in the privilege and responsibility of accepting new students mid-year, and (2) to avoid limiting school options for mid-year transfer students.

Their solution: Each school is required to earmark dedicated waitlist and enrollment spots for new students. Now, when a new student moves to Denver after the school year has begun, they go through the same school selection process as everyone else did at the beginning of the year, so they have a similar opportunity to attend the school of their choosing.

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Typical Enrollment **Problems** and Recommended **Solutions**

	Coordinated marketing & outreach	Common timeline	Common application	Common enrollment	Common year-round processes
Lack of equitable access for higher-risk populations	■	■	■	■	■
Lack of awareness of choice	■	■	■	■	■
Insufficient information about school options	■	■	■	■	■
Misaligned application timelines and separate applications		■	■	■	■
Lack of transparency and trust in lottery and selection process	■	■	■	■	■
Limited school options for mid-year transfers					■
Lack of data to track or predict enrollment	■	■	■	■	■
Paperwork and administrative overhead overwhelming families and staff alike	■	■	■	■	■

Increasing impact

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AVOID THIS PITFALL

While you might find it helpful to glean ideas from other districts, avoid the temptation to skip over any part of your own design process in favor of copying another system. Every district has a different environment, and what works in one might not be the right solution in another. To ensure your enrollment strategy is the right one for your community, you'll need to put considerable time and thought into the process and engage with your own families to understand their needs.

Other factors that determine your enrollment strategy

Besides ensuring your new enrollment strategy addresses the unique issues you face, you'll also need to consider other important factors when weighing your decision about which solution to choose.

- Financial resources available to implement and maintain the new system
- Staffing and capacity to oversee implementation and ongoing management of the system
- Nature of relationships between:
  - Traditional district, magnet, and charter schools
  - Charter schools and their authorizer
  - School district and city leadership
- Role of neighborhood school registration policy, process, and timing
- How your application process aligns with registration across all schools in the district — the more closely these processes align, the more consistent your families' experience and the more seamless your data.

As your stakeholders talk through these factors, the scope and timing of what might work best should begin to come into focus.

What does the design process look like?

When designing the new enrollment system and policies, there are two basic rules:

1. Take your time (think months, not weeks).
2. Involve as many stakeholders as practical.

Most policy design processes take at least a few months (and up to a year) and require a consistent group of stakeholders committed to meeting on a regular basis to arrive at the decisions that will shape the system.

When assembling a design team, include:

- Higher-level decision makers (such as school leaders) to provide insight on budget, politics, and community impact.
- Stakeholders who have local enrollment expertise (such as registrars or office managers) and can draw on their front-line experience to weigh in on operational efficiency, technology challenges, and parent experience.

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What to consider when designing strategic enrollment policies

Enrollment strategy	Factors that may influence system design
Coordinated marketing and outreach	• Community members' baseline knowledge of school choice • Families' current approaches to finding information about school options • School attributes that parents find most helpful in the selection process • Community demographics and families' access to technology • Optimal marketing channels, including community organizations and influencers that can help promote school options and provide support
Common timeline	• Existing application, lottery, and registration dates at each school • Relationship between school calendars and enrollment calendar • District and school-level budgeting calendar and school staffing decisions • Application window may need to open earlier (historical trends may not tell the whole story) • Enrollment calendars for private schools and other non-district options
Common application	• Questions currently asked on each school's application • Must-have questions to retain on a common application • Application format — online, paper, or both • Languages into which the common application will need to be translated • Ranking system for school selections in order of preference
Common enrollment	• Type of student assignment algorithm to be used and school ranking system • Policies when school demand exceeds supply: maintain waitlists or hold empty seats for students who apply at a later date • School-level policies and expectations around over-offering seats • Implications for applicants who don't match with requested schools • Process for students who miss a deadline
Common year-round processes	• Participating grades and schools • School choices available to students who move to your district after the beginning of the school year • School choices and processes available to existing students who want to transfer to a new school after the beginning of the school year • School-level accountability with regard to maintaining enrollment levels throughout the school year • Expectations and policies regarding expulsions or "counseling out"

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How will we define success?

It's very important to define what success looks like early on, as you're designing your system and policies. Refer back to the problem you are trying to solve and then document a succinct goal or two. **The SMART approach works well:**

Setting attainable goals

Oakland, CA

With an ambitious vision of full unification of enrollment, each year, the Oakland school systems make incremental, appropriately scoped improvements across the traditional and charter school sectors, with the goal of unifying all processes in the future.

In the first year, all schools agreed to a common timeline for enrollment confirmations. The next year they created an online school finder tool and accompanying printed guide. In year 3, the district made marked improvements in its internal enrollment operations, and charter schools worked together to offer one common application that gave parents a simplified process.

Specific

Don't be afraid to very specifically state what your picture of success looks like. Are there certain subsets of families you're hoping will participate? Are there particular schools you'd like to be involved? Is there a specific number of page views, inquiries, or applications you want to yield? Name them, and be as specific as you can.

Measurable

Gather some real data: It doesn't have to be a heavy lift — it can be something as simple as administering parent surveys or reporting on total number of applications received.

Attainable

Scope your work to align with your available resources (financial and human), time, and level of stakeholder buy-in. Be realistic when creating your goals: If your long-term goals are larger in scope, consider a multi-year phased approach with documented milestones.

Relevant

How do the problem and the goal relate to each other? Create goals that tie directly to your stated problem.

Time-bound

Tie your stated goals to specific dates, months, and years that accommodate fixed school calendars. Doing this will ensure you stay on schedule and will help unify all stakeholders in hitting the targets.

Revisit your goals frequently to ensure that the project team and stakeholders stay focused on the purpose of the work to prevent the ever-dangerous "scope creep."

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Who should administer our new system?

Whether your district decides to pursue a smaller-scale initiative or a comprehensive common enrollment system, you'll need a team in place to carry out the design and strategic and operational decision making.

Any combination of people, committees, boards, or departments can be tasked with long-term strategy and day-to-day oversight. The more all-encompassing the initiative, the more stakeholders should be involved, and each participating school should have at least one "voice" in the governance process.

The following are some examples of entities that could administer the system:

School district

This is the most likely scenario if participating schools are all district schools or if participating non-district schools have a high degree of confidence in district leadership and enrollment staff.

If you go this route, you'll need to invest in staffing and organization supports. You may want to create a new department tasked with supporting and overseeing all choice, access, and enrollment-related services. Consider including staff for policy making and strategic planning, reporting and forecasting, enrollment operations, and support and outreach for families, schools, and the broader community.

If participating schools also include charter or other non-district schools, the below options may be given stronger consideration.

Mayor's office or other city agency

This can provide an environment of neutrality and transparency, but can also be challenging politically and financially.

Existing community-based organization

An established and respected family-focused organization might be interested in taking ownership of the system.

Newly created nonprofit organization

This option, while expensive, would allow participating schools to create an operation and brand identity that is truly their own.

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Family & Community Outreach

The linchpin to a successful enrollment system is unequivocally the communication, outreach, and supports provided to families.

Even a world-class enrollment system with airtight policies and the latest technology can't be truly effective if parents have not been involved in the process, don't understand how to interact with the system, or — worse yet — are suspicious of the changes being made. Your families are your "customers" in the enrollment experience. It's imperative to engage with them and help them feel supported, not only throughout design and implementation, but also in the school selection process and throughout their children's enrollment in the school and district.

PRIMARY CONSIDERATIONS

✓ Seek out feedback from a diverse set of families throughout design, development, and implementation.

✓ Develop tools that make it easy for families to explore school options, make the best choices for their children, and feel supported throughout the process.

✓ Use targeted outreach and partner with community organizations to get the word out.

✓ Empower schools to proactively communicate with their interested families.

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When and how should we involve families in designing new enrollment policies?

Start now! Parents should influence your early-stage thinking and planning related to enrollment policy and developing your policies and supports. Ask what has worked well for them during enrollment in the past, what was challenging, what tools or information might have helped them, and whether the current school options are meeting their needs.

Here are some ways you can gather this type of feedback from families:

Focus groups

Although the overall number of families you can reach through focus groups will be relatively low, the insight you gather will be specific and rich. Conduct multiple focus group sessions (five to ten total) in various areas of your city so you can ensure you hear diverse perspectives from parents and guardians from various backgrounds.

Surveys

If you're seeking very discrete data — the percentage of families who are confused by the application or who found the school selection process easy — surveying is the way to go. You'll have a larger number of participants that are likely more representative of your community's overall population than with just focus groups.

Feedback by proxy

Interview community-based or faith-based organizations, teachers, or school leaders to gain an understanding of what's working well and what challenges families face throughout the enrollment process. Even though the information is secondhand, you'll still get some general insight into how families are faring under the current system.

User testing

Before rolling out new parent-facing tools, test them with families to see what they like about the system and what they might struggle with. Is the system intuitive? Does anything seem to frustrate them?

> Enrollment is most difficult for hard-to-reach families, so when you're gathering feedback be sure you identify and include these families to ensure you're accounting for the unique challenges they face.

AVOID THIS PITFALL

Be careful to set expectations about the specific type of feedback you need from families and how (or whether) it will be incorporated into the work you're doing. Focus on looking for overarching themes and shared family challenges that could be addressed by systemic improvements.

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What tools can assist families in finding the best school for their child?

Many families may not be familiar with the school options available and how to research them, or they don't have the time or means to track down all the information they need. Also, the portfolio of school options can change each year, with schools opening or closing and enrollment policies being updated. Offer tools and supports for families that can be easily accessed, such as:

Online school finders

Consider setting up a school finder platform through your website so parents can explore schools and identify those that are the best fit for their child. A good school finder is intuitive and dynamic, allowing parents to "shop" for schools from their computer, tablet, or smartphone, then matching schools to the student's needs and interests. Each school profile should include information about academic programs, before- and after-school opportunities, performance, demographics, and similar programs. More sophisticated school finders also allow families to mark "favorites," compare three or four schools at a time, and directly link to enrollment applications.

Printed enrollment guides

Some parents still prefer to access information about school choices on paper. And some schools appreciate the ability to hand out marketing collateral at recruiting events. On the downside, printing and distributing guides can be expensive and they have to be reprinted when updates are needed.

Hotlines, help desks, and enrollment centers

Many parents will have questions or need to contact someone — in person or by phone, email, or text — during this search process. Have knowledgeable bilingual staff available to support parents, and establish protocols to be sure parents receive consistent information.

Parent liaisons

Parents find that other families are often good sources of information. Provide training to parent liaisons to ensure they share accurate and unbiased information, and establish a scheduling system so parents know how and when to meet with liaisons.

Staffed kiosks in libraries and schools

For families who might not have access to the internet, consider setting up kiosks with computer stations at schools, libraries, or community centers during peak enrollment periods. Have one or more knowledgeable staff members available to answer questions and offer support as parents conduct school research and apply online.

Parent champions

Camden City School District
Camden, NJ

The Camden Enrollment team established Parent Champions — a group of parents who are involved in their community and schools and want to help other families. Parent Champions meet once a month to share feedback on policies, potential system changes, and issues that could impact enrollment. During one Parent Champions session, participants had a lively discussion about Camden Enrollment's new School Information Cards, and now the group is promoting the new cards to other families in their networks.

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How can we promote our schools and enrollment system to the community?

Building interest through outreach and marketing will help maximize participation, but it's also an opportunity to create a positive and lasting impression of your school district. Even if the changes under the new enrollment system seem minor or self-explanatory to you, families who are used to the previous system might feel frustrated that things were changed with little or no explanation. Outreach efforts can help families feel valued and will also allow you to reach new families.

There are a number of approaches you can take to generate community awareness about school options and research tools, timelines, policy changes, application enhancements, and changes to the student assignment process:

> Consider other ways to reach families who may not be as easy to contact through digital means:
>
> • Make phone calls and "robo calls."
>
> • Host school-based events and tours.
>
> • Advertise enrollment hotlines on local TV stations, especially multicultural media.
>
> • Partner with local realtors.

> Be very clear with participating schools that the community-wide outreach is by no means intended to replace their own school marketing efforts. Each school is still responsible for their own marketing and recruitment strategies and activities.

Targeted school-based outreach

If one of your goals is maximizing participation of transitioning students — those in their last year of Pre-K, elementary, or middle school — a targeted school-based outreach plan is one of the best methods to achieve that. Work with those schools to disseminate information about elementary school, middle school, and high school options and the upcoming enrollment process for the next year. Families generally have a high level of trust in current teachers and school staff, which can lead to high response rates.

Social media and digital marketing

Maintaining an online presence helps create community awareness about new enrollment processes or policies. Many families rely heavily on Facebook, Twitter, and other social media sites to find information of all types. Post accurate and positive messaging regularly, and respond quickly to posts from others that might contain misinformation.

Partnering with community and faith-based organizations

This method can be very powerful in lending credibility to your message. Community and faith-based organizations are typically willing to host school enrollment meetings or make announcements at their scheduled gatherings. They may even be able to help identify parents who might need additional support with selecting or applying to schools.

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School-based outreach

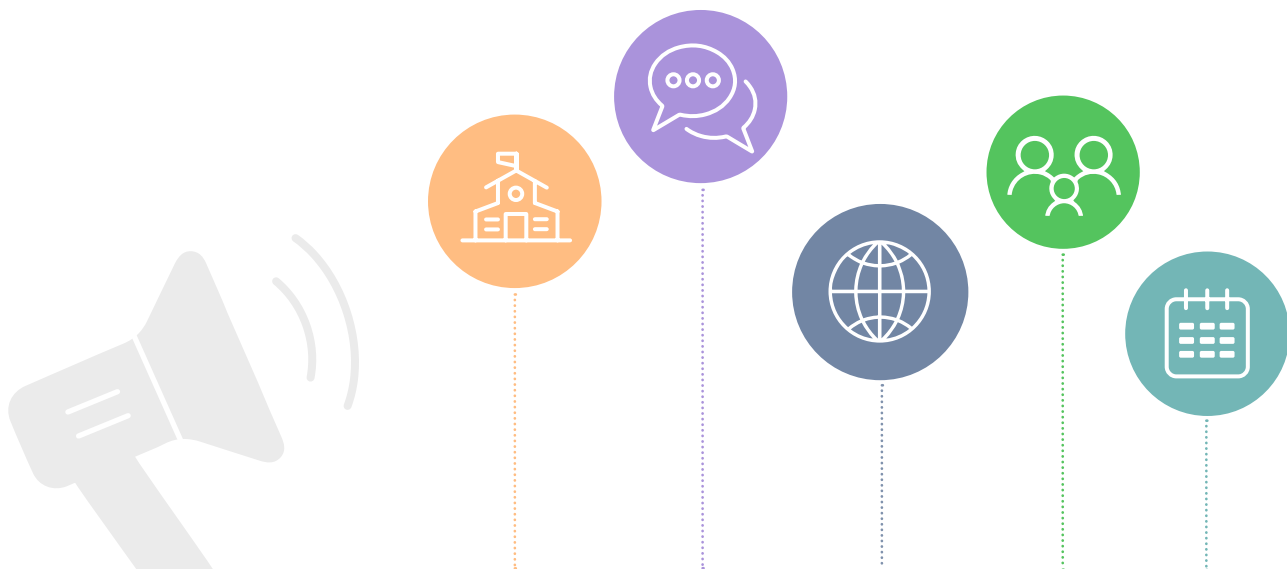### Denver Public Schools
Denver, CO

Every January, parents of preschoolers, 5th graders, and 8th graders in DPS receive a customized packet that includes a personalized letter from the school principal with information about the next year's school choice process, application deadlines, and the neighborhood school where their child is guaranteed a spot. It also includes a District Enrollment Guide to jump start their school selection process. At many DPS schools, the student's current teacher is accountable for ensuring each student has submitted an enrollment application before the deadline. The district also hires family liaisons to help track families that haven't submitted applications and support them as needed.

Advertising

Local advertising on billboards, bus stops, or banners at community events can be an excellent way to generate awareness among the community about the new enrollment system and improved process for selecting schools that best meet their children's needs. Ads should be consistent and contain no more than two or three key messages — avoid presenting extremely detailed information. This method works best when used to supplement other more targeted methods.

Door-to-door canvassing

Communicating directly with families by going door to door is costly, but it can be an effective way to reach those in specific neighborhoods or areas with historically low participation rates. The personalized nature of a one-on-one conversation can be impactful compared to other methods of outreach. Be aware, though, that the number of families you actually reach might be very small, and it could be challenging to find qualified canvassers who communicate well with families.

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How can we effectively communicate with parents who might be interested in applying to a particular school?

Since individual schools are responsible for meeting their enrollment targets, they are often naturally motivated to proactively communicate with families who have indicated interest. Be sure that each school provides ongoing, personalized communications through the mode that families prefer (text, email, or phone) to cultivate relationships that are likely to increase engagement and participation.

Tracking recruitment events

When school recruiting efforts get underway each year, it is important to closely track the details of each event (date, time, and location, for example) and record the turnout. This will inform decision making about recruiting strategies in subsequent years.

Monitoring and managing interest

As every good salesperson knows, it's important to keep a record of those who might be interested in "buying" — applying to a school — so the appropriate follow-ups can be conducted. Some schools do this informally by collecting parent contact information at open houses and following up with a phone call or letter. Others take a more sophisticated approach by using customer relationship management (CRM) tools to automatically track, categorize, and communicate with interested families.

Communicating with prospective families

Before students are matched with schools, school staff may want to communicate either with individual applicants (for example, to ask a follow-up question about information submitted on the application) or groups of applicants (perhaps to send a "thank you" email or inform them about the lottery date). In either case, keep the communication brief and easy for school staff to generate and track, and be sure that it's sent to parents in a way that is convenient for them.

AVOID THIS PITFALL

Non-English speaking parents in your community might need extra support in navigating the school selection tools and application. it's important to have staff available who speak families' own languages in-person or phone support. Also, be sure to have all enrollment materials translated and readily available in the languages that are most prominent in your community.

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Systems & Technology

As you transition your school system to strategic enrollment management, the technology platform you select needs to accommodate not just your immediate needs but also your long-term vision for enrollment. To determine the best technology solution to support your strategy, consider your enrollment system design requirements and don't lose sight of your desired goals and outcomes.

This section will help you prepare for selecting the right technology, plan for testing and implementation, and consider which vendor to partner with.
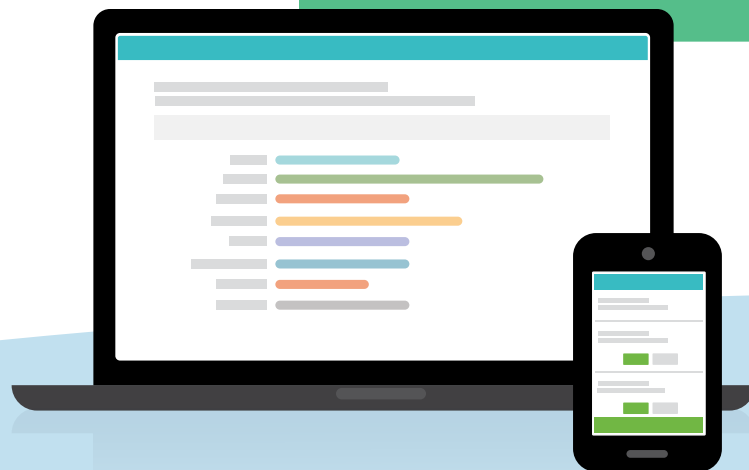
PRIMARY CONSIDERATIONS

- Document the technical requirements based on your completed system design and identify the technological solution that will best support your enrollment strategy.

- Determine the amount of time and human resources you'll need to develop and implement your technology solution.

- Establish your top criteria for a technology provider before initiating the procurement process.

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What type of technology solution(s) can support our enrollment system?

Before choosing a technology system, you first need to complete the design of the new enrollment management system, including policies and governance. Once you are clear on the system's required capabilities, you can confidently document the technical requirements that will guide your assessment and any request for information (RFI), request for proposal (RFP), or other procurement requirements.

The type of technology you need depends largely on the enrollment management strategy you're employing. **The following table outlines the recommended technology systems.**

AVOID THIS PITFALL

Don't be enticed by new or trendy technology or design. Technology alone is never a silver bullet. A well-designed system that's based on solving a clear problem and is overseen by capable staff with buy-in from users and stakeholders is what enables technology to be successful.

Enrollment strategy	Technology recommendations
Coordinated marketing and outreach	Online school finder, a tool for parents to research and compare schools: • Can house detailed school profiles, performance and programmatic information, application requirements, and other relevant information. • Offers the ability to "favorite" schools and sign up for school newsletters or events. **Consider:** Technology to track family engagement and data as marketing and recruiting activities increase.
Common timeline	Typically requires no additional technology — just agreement among participating schools to share the same schedule for applications, lotteries, offers, and acceptance deadlines.
Common application	**Online application and enrollment portal – one central location where:** • Parents can submit an application and track its status. • School or central staff can view, manage, and monitor application data, school demand, lotteries, and family communications in real time. **Electronic communications to keep parents informed and engaged:** • Send automated or one-off communications to individuals or groups of applicants. • Send messages by email, text, and voice according to family preference.

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Common enrollment	School match functionality as defined by the student assignment algorithms, based on three distinct inputs:

- A ranked list of the schools to which each student would like to apply, in order of preference.
- A clear set of rules describing how each school prioritizes their applicants for enrollment if they have more applicants than seats available, and how each lottery is run.
- The number of enrollment offers each school will extend to students in each grade.

Result: one school assignment for each applicant
Automating these complex processes can add a considerable degree of accuracy, efficiency, and transparency.

Common year-round processes	Includes mid-year coordination of student enrollment, transfers, and withdrawals. Requires:

- Enrollment monitoring technology: View school enrollment numbers with accurate, real-time visibility into seat availability,
- Transfer workflow technology: Pre-configured, automated workflow to ease school transfer requests, approvals, and communications at current and transfer schools.

Automated student registration

Once the application process is complete and an offer is extended and accepted, the family transitions to the registration process. (Direct registration into neighborhood schools also needs to be supported.) Automating student registration will save time and money, increase data accuracy, and level the playing field for family access and support.

Families should expect a consistent user experience throughout application and registration. Districts need the ability to communicate with families and track students during the entire enrollment process to ensure roster stability and predictability.

Consider: An online registration system that supports new and returning students and integrates with the district's student information system (SIS) to maintain accuracy in the student record.

Don't forget to gather input from your staff and family end users as you're writing your technical requirements and testing the system — you'll save valuable time in the long run. Also, consider your diverse population of families when selecting technology capabilities — languages spoken, internet access, technology usage.

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Increased access with technology

Oakland Unified School District
Oakland, CA

Technology is allowing OUSD to bring services to the families that need them most. In the first four weeks of implementation of the enrollment system, some of the schools that serve mostly low-income, non-English-speaking families have some of the highest participation levels the district has seen. With the new technology, families who were previously unable to communicate about or track their applications now have a greater sense of ownership and clarity, asserts OUSD's executive director of enrollment and portfolio management.

Can we use our existing technology instead of buying a new system?

While it may be tempting to use existing technology to serve as the platform for your new enrollment system, there are some important factors to consider:

- **Long-term vision:** Is the existing technology flexible and scalable enough to support your longer-term goals for managing enrollment? If, for example, you plan to expand the number of schools supported by a common application down the road, it's best to replace the current system with one that can handle the eventual load. It will also give you flexibility to expand in other areas as you grow.

- **Ownership and trust:** When stakeholders collaborate for the first time, there can be inherent trust issues concerning any existing technology and who oversees and uses it. Will the "owners" of the existing technology be transparent about functionality advantages and weaknesses? Will new users have an equal voice?

- **Integration capabilities:** Identify current and future school- and district-level system integration requirements and gain an understanding for whether the current system can support evolving system integration requirements.

Consider time, budget, and human capital requirements for getting the new system up and running. You may be able to save a considerable amount of all of the above if you deploy more than one module at a time from the same vendor (for example, buy an online school finder and application at the same time).

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How much time and staffing resources will it take to successfully develop and set up the system?

Here are some estimates to consider for each of the various types of technology solutions you may be considering.

Technology solution	Approximate time to implement*	Suggested human capital*	Estimates may depend on
Online school finder	2 – 6 months	One – two people • System design integrity • Vendor coordination • Data collection from schools	• Number of schools participating • Number of data fields
Online common application	4 – 8 months	One – two people • System design integrity • Vendor coordination	• Number of schools participating • Complexity of application requirements
Configuration of student assignment algorithm	6 – 8 months	One – three people: • System design integrity • Vendor coordination • Documentation of lottery configurations • System testing	Complexity and diversity of school lotteries
Transfer workflow	1 month	One person to configure and test workflow	Complexity of workflow
Registration and enrollment monitoring	1 – 2 months	Two – three people: • Configure and test workflows • Vendor coordination • Create forms • SIS integration	Complexity of workflow, forms, SIS integration

* All figures are rough estimates, assuming standard implementation in medium sized districts with one – two project managers.
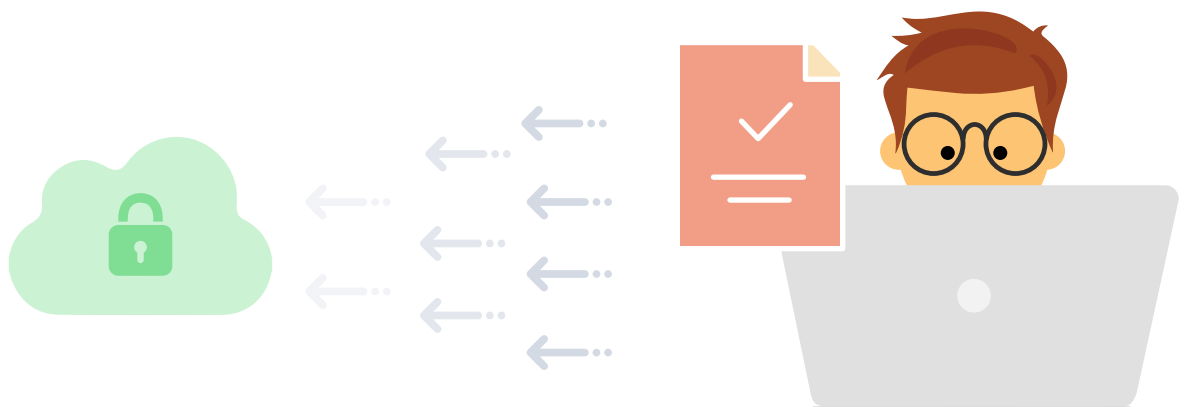
Be sure to allocate ample time to train school staff on how to use the new system with in-person sessions as well as written materials. Transitioning to a new system can be time consuming and potentially stressful for overworked school registrars and enrollment staff, so the easier you can make the training and adoption process, the better.

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What do we need to consider when selecting a technology provider?

One of the most critical decisions you'll make in the process is selecting your vendor. Allow enough time for the necessary steps in the selection process including issuing an RFI or RFP, conducting due diligence and interviews, developing the bid package scoring rubric, and so forth. Be sure to include school staff — and possibly even parents -— in the process.

In addition to taking pricing, functionality, and implementation timing into account, here are other areas to consider when identifying the optimal technology partner for your enrollment management solution:

- **Consistent, simplified end-user experience:** The vendor you choose needs to be very familiar with building simple, intuitive interfaces that are available in multiple languages, can be accessed through multiple devices, and are consistent across the school selection, application, and registration experience.

- **Responsiveness and support:** Be sure you have a thorough understanding of the supports and training opportunities your vendor will provide — during initial implementation and afterward, and for both administrators and parents.

- **Ability to accommodate your unique design elements:** Be sure to ask specific questions of your selected vendor about how, exactly, their solution will support the unique design requirements. Depending on the complexity of your design, additional fees may be quoted by the vendor to cover customization costs.

- **Proven track record and expertise:** Take a critical look at similar projects your selected vendor has completed for other school systems. Did the vendor deliver on time? Within budget? How satisfied were their clients with the development process and overall delivery? Know how long the vendor has been doing enrollment work and speak to current customers.

- **Cloud-based solution vs. on-premise:** Web-hosted solutions have become widely accepted in K–12 as they are reliable and secure while being more dynamic and flexible than an on-premise solution. System capabilities can more easily evolve with changing policy, staff, and family requirements. Costs can also be more closely contained due to the modular nature of a software as a service (SaaS) model.

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Assessment & Evaluation

As discussed in chapter one regarding the design process, it's critical to define the problems you are solving for so you know how to monitor progress and measure success. Quantifying the current state helps to establish a baseline for monitoring the effectiveness of the enrollment management system to inform continuous reflection, improvement, and operational decision making.

Assessment and evaluation are core to system implementation planning. You will need to determine up front how you will monitor progress and the tools that you'll need: What reports and analytics will need to be generated, and how often? How will you get feedback from key stakeholders? Will you conduct a formal summative assessment?

PRIMARY CONSIDERATIONS

Identify the key metrics to monitor system health.

Understand the different types of assessment methodologies.

Be thoughtful about who will conduct the summative assessment.

Share assessment results with relevant stakeholders in an appropriate and timely manner.

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What kinds of data can help us monitor the health of the enrollment system?

The first step in the process of monitoring and evaluating system progress is identifying the metrics that you'll need relative to the objectives of your enrollment system. Below are some common examples of two primary types of data that can help you measure progress.

Types of data and examples

Feelings and perceptions

↗ Staff and families' awareness of process, timelines, and school selection

↗ Families' experience and satisfaction with school selection process
- Ease of access to school information
- Sufficient amount of school information
- Ease of application process

↗ Staff satisfaction with the enrollment process and tools at both the district and school level
- Ease of use
- Buy-in about process, roles, responsibilities

↗ Staff and family perception of system rollout and support throughout the process

↗ School attributes that influence families' school selection

↗ Perception of the fairness of the enrollment system

Operational metrics

↗ Trends in application volume and seasonality (aggregated and school level) — total number of applicants vs. in previous years by:
- Grade level
- Free-reduced lunch status
- Neighborhood
- Other demographic factors

↗ Applicant behavior compared to previous years.

↗ Phone and email inquiries from families

↗ Application processing time for staff and families

↗ Enrollment portal traffic and application "conversion" rates

↗ Family adherence to application and registration timelines

↗ Extent to which lottery results matched school-level expectations

↗ Student "match" rates (how many applicants were matched to their first- or second-choice school)

↗ Aggregated and school-level supply and demand

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What assessment methods should we use to measure our system's effectiveness?

Ongoing progress monitoring

Consistently checking key metrics and gathering feedback in real time allows you to check the health of your system as you go and make adjustments as needed. Again, it's important to define which data points will be needed and how often before the enrollment cycle begins.

Be sure administrators and school staff have access to the appropriate reporting and analytics to monitor the operational metrics and generate enrollment reports to identify any areas of concern and take action. Your selected technology solution should gather most (if not all) of this information automatically, but reports must be reviewed and analyzed regularly to implement system changes.

Another important source of data when assessing ongoing system health is the perceptions of your key stakeholders — which can make or break the system. Taking the pulse of families and staff and gauging their opinions about the enrollment process along the way will help you avoid being surprised down the road, perhaps after a summative annual assessment.

An ongoing structure of surveys, focus groups, interviews, and "ears on the ground" can provide you with critical insight and subjective feedback as you go so you can address issues as they arise.

Summative assessments

Summative assessments are simply a "rearview mirror" look at the enrollment system's performance. You can conduct these assessments semiannually, annually, every few years, or at another frequency, and you can vary them in scope and definition. In some cases, summative assessments can simply be a summary of your ongoing progress monitoring.

These more formal assessments are generally viewed as higher stakes and can be quite substantive, time consuming, and costly — yet they can be vital to your monitoring of the system's overall health as well as stakeholder buy-in. As you prepare to conduct the summative assessment, make sure you clarify the rationale, scope, and intended use of the findings. This preparation work will help you create parameters, offers an opportunity to build consensus, and should help prevent the analysis from veering off track.

Consider building "mini-surveys" into your processes where families and staff can provide immediate feedback on their experience with the system.

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Who will conduct a comprehensive summative assessment?

A summative assessment or evaluation can provide a wealth of important information — and it can be an extensive undertaking. When you're identifying the right person or group to conduct a summative assessment, consider some important factors: Who has credibility with your stakeholders? What capacity do they have to deliver the kind of assessment you need? What will it cost? Aligning those answers with your documented purpose should lead you to a short list of viable options, which might include one or more of the following:

- **System owner or administrator:** Using internal resources for a "self-assessment" of sorts can be a less costly way to go, particularly if the primary purpose is internally driven (for example, it will inform future improvements). Steer clear of this approach, however, if the purpose is to prove something to external parties who have reason to doubt your system's intentions or efficacy.

- **Local community organization:** Nonprofits in your city may have staff members with the analytical skills to conduct your assessment. This can also be a less-expensive alternative, but it may mean the organization has less capacity to perform the work.

- **National nonprofit organization:** Some organizations focused on education policy may have an interest in conducting your assessment. While they might have a high degree of subject-matter expertise and qualified staff members, be sure you obtain an understanding of how your key stakeholders view the organization and their work.

- **Local college or university:** Because higher education organizations are often considered politically neutral, this approach is highly recommended if the enrollment system is at all controversial. Education or public policy professors and doctoral candidates might have an interest in incorporating your assessment into their research, making it a win-win for both parties.

- **For-profit company:** While hiring a private analytics shop or consulting firm will likely be a more expensive option, they are typically well-equipped to deliver a high-quality assessment in a short amount of time.

AVOID THIS PITFALL

When it comes to data, sometimes less is more. Avoid trying to incorporate every data point you have into the assessment, though it may be tempting. Instead, prioritize data that ties directly to your assessment's stated purpose and use. This will help bolster the "story" being told by the data analysis without the story being overshadowed by excess (and possibly unimportant) analytics.

Before you begin gathering data for a summative assessment, document the key metrics and other data you'll need to minimize scope creep and ensure the assessment will align with the vision of the enrollment system. Be sure to tie the assessment objectives and intended system goals to the problem statement identified in the system design phase.

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What should we think about when sharing information about system progress, including assessment results?

School districts almost always need to communicate the results of the enrollment system assessment with schools, parents, community and board members, and others. It's important to think carefully about how, when, and where assessment results will be shared with different recipients.

Be aware of any political sensitivities about the messages conveyed by the analysis and the impact it could have on each party's own interests. For example, school leaders will be interested in how school demand data is relayed to the community.

Remember that you are, in essence, telling a story about the data. At the center of your story is the quantifiable data analysis, but use qualitative information to tell the story, and be sure to include specific examples to add depth and personal connection. Keep the analysis simple and high level and focus more on the storyline, particularly with parents and community members. School leaders and others who have more topical knowledge will appreciate a deeper dive into the data, analytics, and conclusions.

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Conclusion & Considerations

As more families are given opportunities to find the best-fit schools for their children, districts and cities are finding that a new approach to enrollment is necessary in order to truly level the playing field and ensure equitable access to a high-quality education. The new approach requires new policies and processes to support access to an expanded set of school options, but more critically, family empowerment will necessitate a cultural transformation within your district that goes hand in hand with strategic enrollment management.

Adopting a more holistic, strategic approach to enrollment means transitioning to a customer service-oriented, relationship-based enrollment philosophy. It requires designing a new system and developing new responsibilities and competencies related to marketing and community outreach, school selection and support, and enrollment policy and operations.

Strategic enrollment management is a change management exercise that requires attentive leadership and careful stewardship. It can feel overwhelming at times. Will stakeholders want to do it? What will it cost? How much time will it take? Who will own it? There's no need to despair: Seek out support from those who have embarked on this journey before you. Be patient and start small. And, most importantly, have a vision unique to your community. Know where you are going and why you are doing this work.

By simply recognizing the importance of enrollment strategy as a core district competency, you have already taken the first step toward providing an equitable, transparent, and efficient experience for your families. Congratulations on getting started! Your efforts are changing the national educational landscape and setting a high standard for family empowerment and student success.

We wish you well on your journey.

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Acknowledgements

We appreciate the following individuals, experts in the field of enrollment, for reviewing some or all parts of this guide: Sujata Bhat, K–12 consultant; Shannon Fitzgerald, K–12 enrollment systems consultant, Shannon Fitzgerald Consulting, and author of **Reimagining the PreK–12 School Enrollment Experience** (this very guide!); Betheny Gross, senior research analyst and research director, Center on Reinventing Public Education; Abby McCartney, co-executive director, Camden Enrollment; Taryn Moore, enrollment strategy implementation manager, SchoolMint; Kate Sikora, enrollment strategy implementation director, SchoolMint. Appreciation is also extended to Dr. Peter Gorman for his insightful observations and reflections in this guide's foreword.

These individuals' commitment to the growing field of enrollment management is advancing our thinking around enrollment policy, governance, and operations and is of tremendous value to each of us.

We are also grateful to those education leaders and families in cities and districts around the country who are breaking new ground in the field of enrollment and raising the bar on expanding equitable access to high-quality education options.

About SchoolMint

SchoolMint provides a cloud-based student enrollment and school choice platform to PreK–12 school systems worldwide. Since its founding in 2013, close to 7,000 schools have partnered with SchoolMint to streamline all aspects of the student enrollment process.

SchoolMint

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