EPAC / DEANERY MEETINGS

DECEMBER 15-16, 2020

- OPENING PRAYER
- 2021 - YEAR OF RENEWAL FOR CATHOLIC EDUCATION
- MARKETING AND RECRUITMENT 2021
- CATHOLIC SCHOOLS WEEK
- SIS – FACTS
- SCHOOL/ADM

CATHOLIC SCHOOLS *of* BROOKLYN *and* QUEENS

FOUNDATION *for* LIFE

RECRUITMENT & RETENTION - A DISCUSSION ON THE COVID YEAR

COVID will cause many businesses to permanently close.

- Our schools should not be one of them.
  Innovative organizations will seek and find opportunity to help those in need. And they will thrive and fulfil their mission.

NEW YORK POST

METRO

NYC Catholic schools seeing new interest, applications from public school families

By Selim Algar November 2, 2020 | 7:05pm | Updated

- Recruit and accept new students now – (when & where safe and adhering to capacity rules)
- Recruit New students for fall 2021 now. Don't wait for CSW.
- Register returning students ASAP. Simplify, streamline, and gain commitment from your current parents by Jan 31.

These three items are mission critical

- **During this time of global crisis, our mission of helping parents by providing excellent education & development in the Catholic faith is more important than ever.**

NEW STUDENT RECRUITMENT 1…2…3

1. ZOOM info sessions ….
   - Held frequently, online, promoted by social media, shared by parents, supported by HAA, run by Principal, Pastor, Board, Teachers, and Parents
2. Recruitment already started and should run until classes are filled!
   - Catholic Schools Week - (NCEA observed Jan 31 – Feb 6)
   - **Diocese of Brooklyn – observing Feb 7 to 13** but –
   - Recruitment should not wait until then, or stop when it's over.
   - Use the SchoolAdmin tools to receive new inquires and applications
3. Focus, assign, empower people
   - It has to be someone's job. Give them ownership, attention and accountability
   - Focus: Evangelize from religious Ed, convert PreK to K, attract new Kinders who had an altered PreK year, help middle schoolers exhausted with online…
   - Complete continuing registration by Jan 31! Facts invoice for the Reg Fee!

CHANGE – NOT ALWAYS EASY, BUT ALMOST ALWAYS A GOOD THING

- There's support and help
  - FACTS Team
  - OIS, Marie L, MaryAnn S, Superintendents Office

- We need enhanced systems
- We need to tie it all together
- We need to partner & support

FACTS ON FACTS - THE MOVE TO FACTS SIS

- *Quality & Comprehensiveness*
  - Superintendents office team and a Principal task force, met with representatives from FACTS several times to receive an overview of their SIS. We met with other dioceses and schools currently utilizing FACTS.
    We are confident it is a **quality** product. In addition, their interface offers the solutions we need including communication, grading, program support, customization, and more in a *single platform.*
- *Familiarity & Integration- One System goal.*
  - We currently utilize FACTS for our tuition management system and financial aid assessment. As a result, most families are already familiar with FACTS as an online interface. Now, the tuition management will be seamlessly integrated with these additional features provided through the SIS.
- FACTS Implementation Timeline
  - Details on the implementation schedule will be shared after Christmas. This includes training Principals, administrators, teachers and staff.
  - *Diocesan level systems and set ups have started and are in progress.*
  - *School level implementations (data transfer and training) will start in February through April, with a full conversion to the SIS before the 2021-2022 school year. Training will be conducted in intervals during the spring and summer months.*

MORE FACTS HOW DOES IT HELP – BETTER TECH, MORE OPTIONS

What services will FACTS SIS provide our school community?

All current Opt C functions, with enhancements to the **Student information database** not limited to:

- Family Portal and communications - families can update information to ensure it remains current and accurate for school contacts!
- Single Sign On (SSO) with Tuition management and payments - currently provided through FACTS
- Online grading portal system
- Emergency alert services (text message and voice recorded calls) for critical communications.
- Google Classroom integration
- If applicable the FACTS SIS has options for;
  - Lunch ordering and payments - no need for paper calendars or sending in checks!
  - Extended day scheduling and payments - no more paper calendars or mailing bills!
  - Incidental billings (i.e. field trips, fees, and other items)
- And more!

All of these services will be provided on one platform, in one easy to access location for families!

FACTS
A nelnet Company

FACTS SIS Implementation Overview

Kickoff Call	You'll participate in a kickoff call to review the SIS implementation process and develop a training plan that best meets your timeline.
Data Collection, Conversion, and Database Setup	We'll work with you to collect data from your current system(s) or paper for conversion into FACTS SIS. We'll also begin setting up your new database.
Milestone Webinars	As we continue to set up your database, we'll host milestone webinars along the way to review the areas we're configuring.
Continued Training	Your team will continue to host Milestones and provide training opportunities to make sure you're prepared while we put the finishing touches on your database.
Transition to Account Maintenance	As the implementation process ends, you'll transition to account maintenance – this team will be your main point of contact going forward.
Delayed Data Conversion	If there is any other data that needs to be converted, we'll make sure it gets transferred at this point. Then, FACTS SIS implementation is complete!

FACTSmgt.com

SSAE 18 AUDITED | PCI DSS Level 1 VALIDATED

FACTS SIS IMPLEMENTATION OVERVIEW

* Opt C remains in full use and the database of record through this school year

Implementation will include:

- Schools will be placed in a 'cohort' to train in February, March or April.

1. A Kickoff call with assigned Client Services Manager
2. 5 milestones calls with your Implementation specialist over about 5 weeks
3. Lot's of help
   - OIS, MaryAnn, Marie , Dio team - will do the heavy lifting with data conversion
   - Schools will focus on learning the system, and managing the *people* parts

SYSTEMS OVERVIEW

System:	Function:	Current or Former Platform:	Future Platform:
SIS - Student Information System	Student Records Database	Option C	FACTS SIS (aka FACTS)
Tuition Management	Tuition billing and collection	TADS, OPT C, other FACTS as of 2020.	FACTS Tuition Management
Grant and Aid (Futures Scholarships)	Scholarship applications and disbursements	FACTS	FACTS Grant and Aid
Admissions and Enrollment (A&E)	-Inquiry (prospect) management -New Student Applications -Continuing Student registrations, intent, file submissions online	Opt C, Other, none	2021/22: SchoolAdmin 2022/23: Asses move to FACTS to complete a '*one system*' goal.

ADMISSIONS – NOW

SchoolAdmin

- Is THE solution for

  1) Receiving **new inquiries** online – that auto populate to the database

  2) CRM tool for **emails**, **communications** and **reminders** to prospective NEW families

  3) **Online applications**, file uploads, complete admissions funnel

  4) Returning student **registration** – intent, 14 standard checklist items + whatever you want to edit

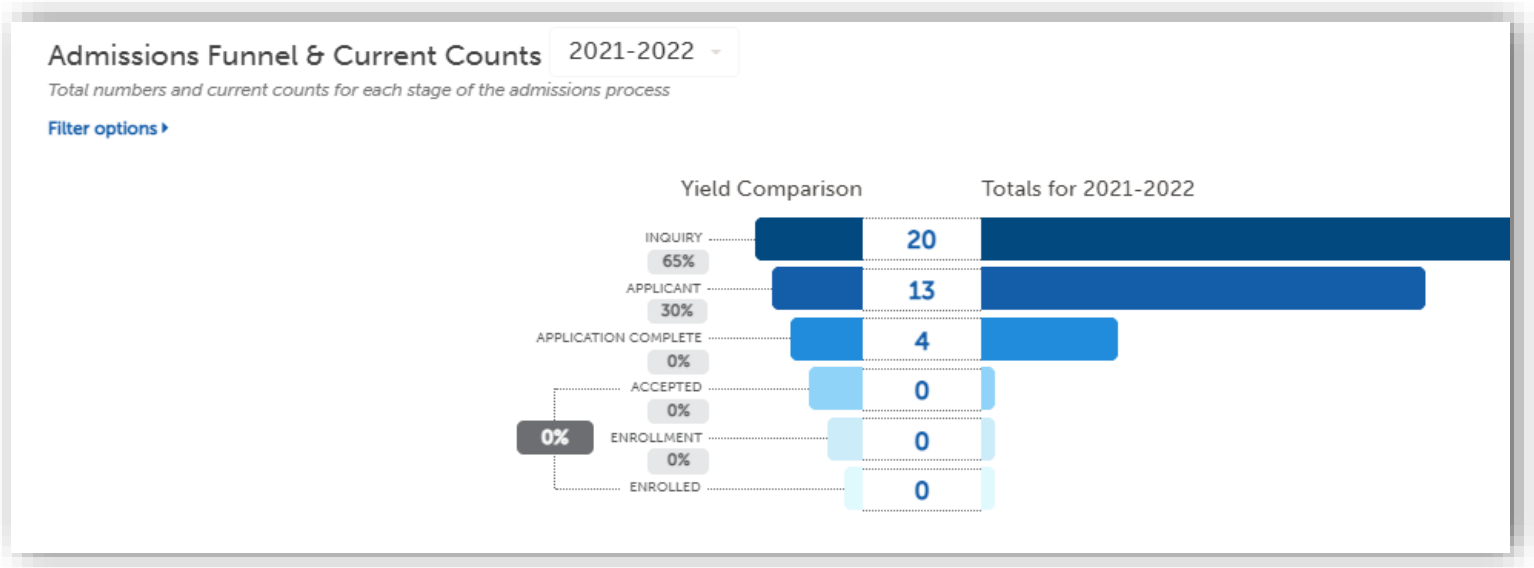
Training and support –

- Weekly sessions and open office hours for one-on-one support since mid summer.
- Schedule for this week and January were sent in the 12/14 Superintendents update

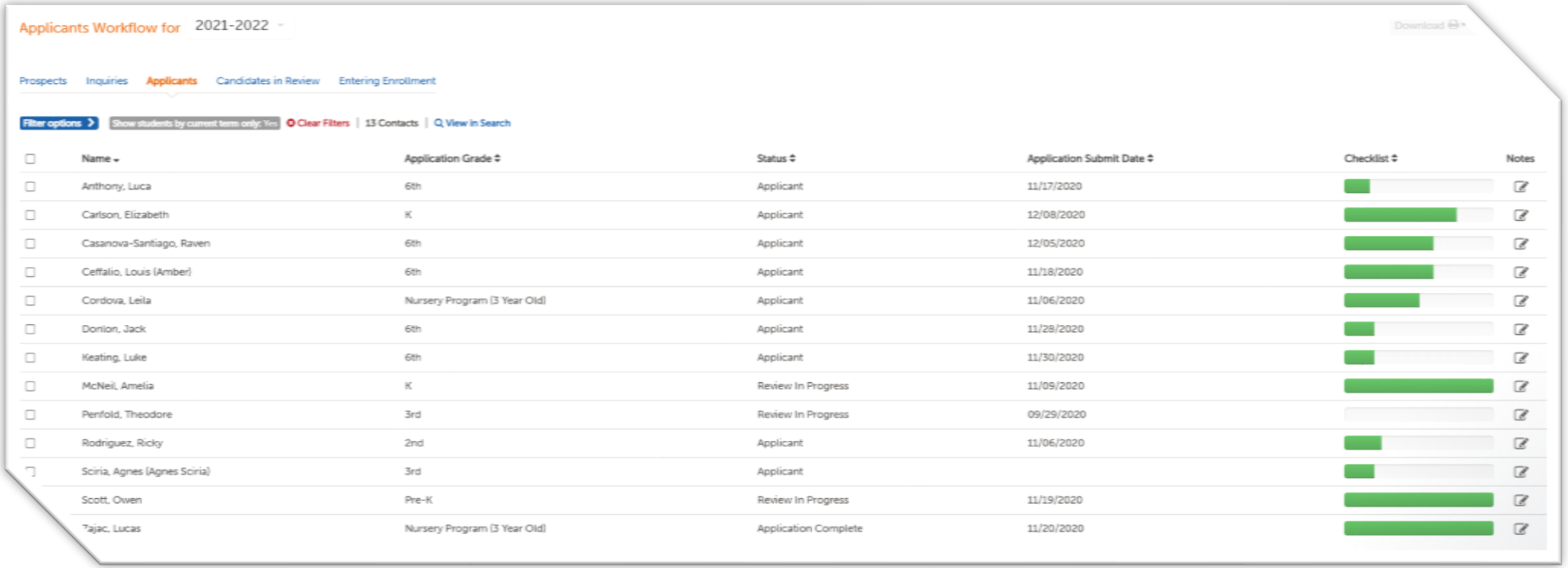
SchoolAdmin

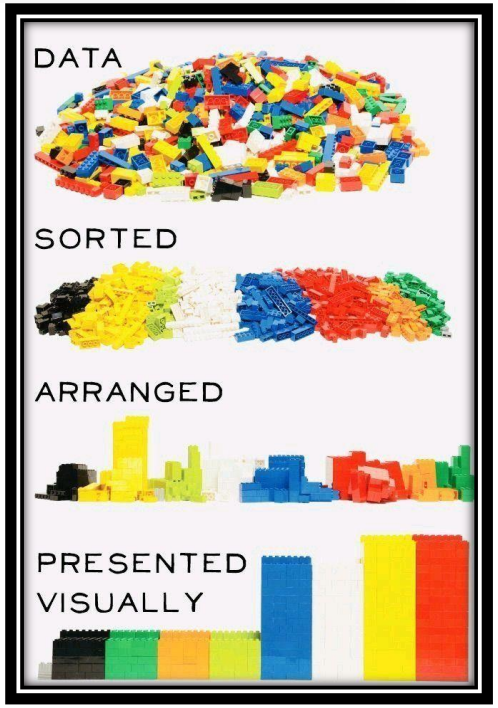
WHAT YOU SEE:

Dashboard – progress so far:



Workflow: who to call next;





You have control over what forms you ask for and when:

Preview Enrollment Checklist for 2021-2022

Add a new enrollment checklist item

Name	Checklist Type	Visibility	Start Term	End Term	Grades	Enrollment Type
Baptismal Certificate	File Upload	Required	2020-2021	*	All	New
Contact Information Update	Online Form	Required	2020-2021	*	All	
Sacrament Information	Online Form	Required	2020-2021	*	All	New
Handbook Confirmation	Online Form	Required	2020-2021	*	All	
Technology/Acceptable Use Form	Online Form	Required	2020-2021	*	All	
Media Release Form	Online Form	Required	2020-2021	*	All	
Home Language Survey	Multiple File Upload	Required				
Health Examination Form	Multiple File Upload	Required				
Allergies/Anaphylaxis Medication Administration Form	Multiple File Upload	Optional				
Emergency Contact Information	Online Form	Required				
Asthma Medication Administration Form	Multiple File Upload	Optional				
OTC Medication Administration Form	Multiple File Upload	Optional				
Distance Learning Acknowledgement	Online Form	Required				
Return To School Acknowledgement	Online Form	Required				

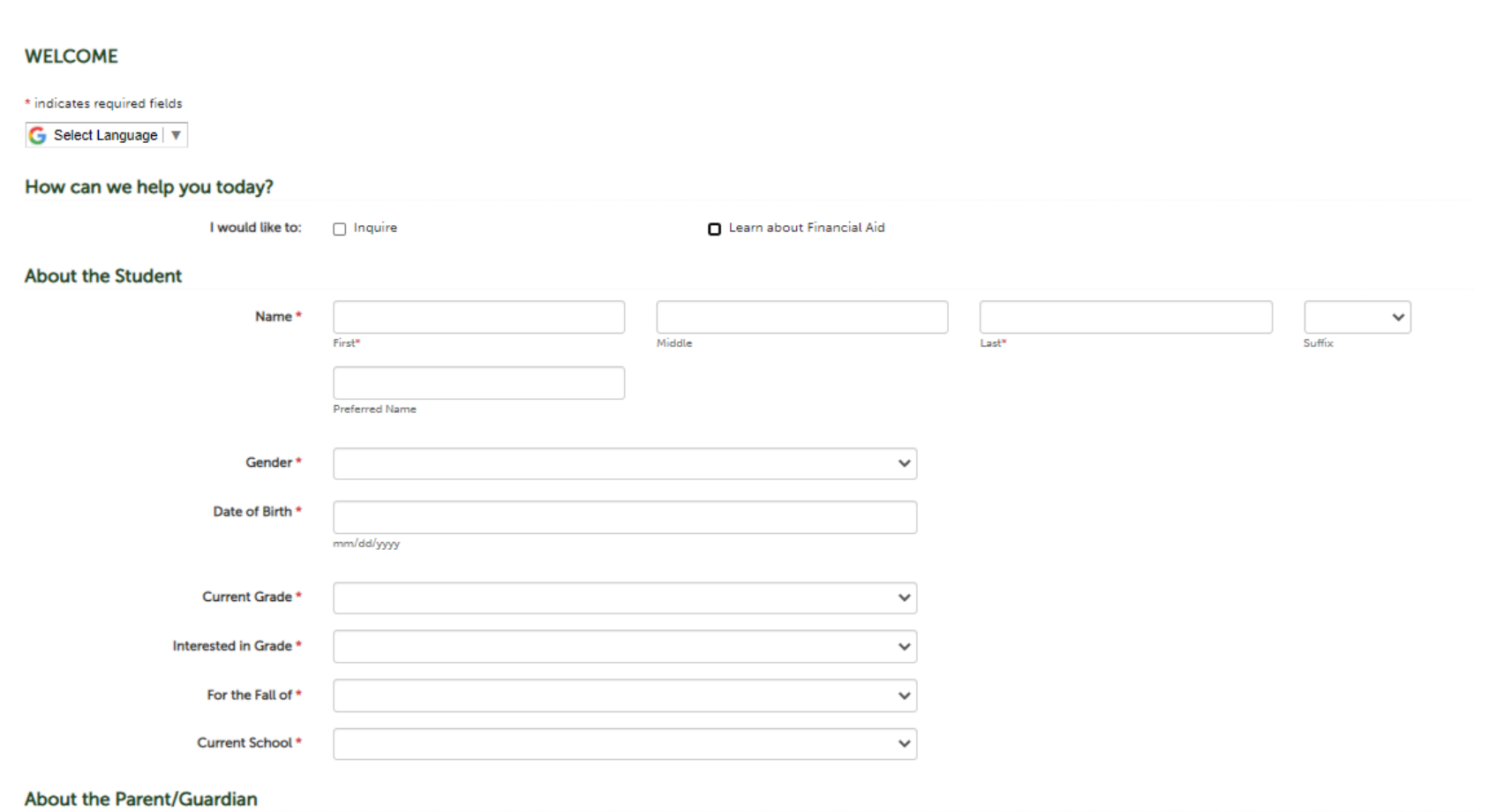
Preview Admissions Checklist for 2021-2022

Add a new application checklist item

Name
Birth Certificate
Application Form
Records/Transcript Request Form
Report Card Upload
Standardized Test Scores Upload
IEP Upload
Applicant Photo

WHAT THE PARENTS SEE TO START:

Customized, personalized inquiry form:



WELCOME

* indicates required fields

Select Language

How can we help you today?

I would like to: ☐ Inquire ☐ Learn about Financial Aid

About the Student

Name * First* Middle Last* Suffix

Preferred Name

Gender *

Date of Birth * mm/dd/yyyy

Current Grade *

Interested in Grade *

For the Fall of *

Current School *

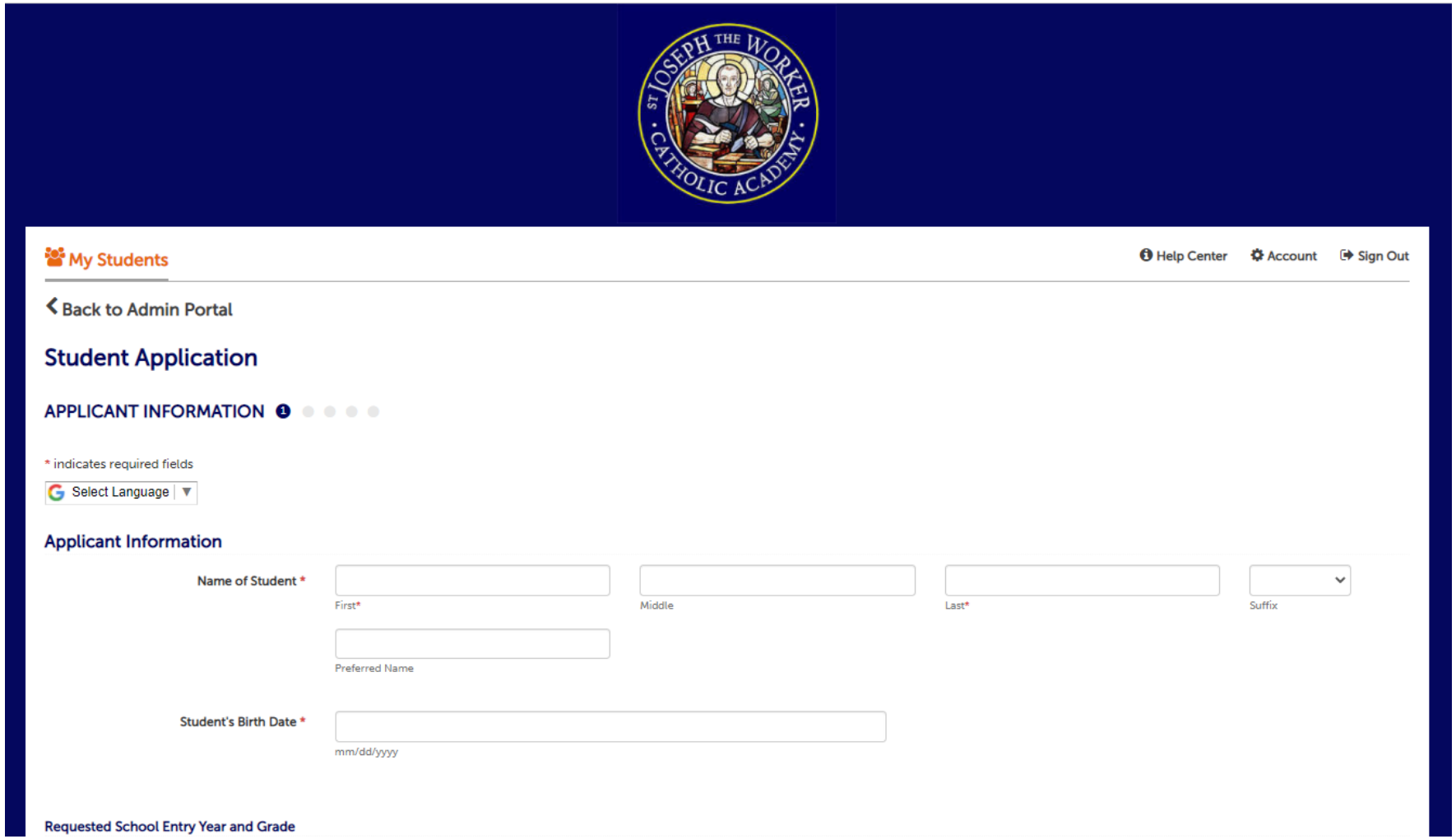
About the Parent/Guardian

WHAT THE PARENTS SEE TO START:

Personalized, customized, application form:

All inquiry and applications forms are built and live.

You need to use them on your web page, emails, promotions



FINANCIAL SUPPORT OF FAMILIES

- Futures in Education Scholarship application opens January 18, 2021!
  - Set a goal to increase your scholarship application pool by *10*%
    (or more based on your specific needs)
  - Early deadline for returning is March 31, 2021
  - Regular Deadline April 30, 2021
  - Offer virtual scholarship application workshops and support for your parents
  - FACTS & Futures in Education will offer webinars for school staff

- Tuition management
  - Set tuition by Jan 31, 2021 and submit tuition to FATCS AND Futures in Education
  - The sooner tuition rates are set, the better it will help with recruitment and retention

Futures in Education – support on call!

Application Link:

FINANCIAL – PAGE 2

- Consider Additional Support in your Budget
  - Make sure all families apply to Futures in Education
  - Assist families in need that do not receive an award (or an award that is not enough) with a local scholarship

- Utilize Tuition Assistance Committees Right Away
  - Encourage ‘auto pay’. Auto pay accounts rarely fall into delinquency.
  - Work with families to anticipate issues in advance when possible
  - Utilize the FACTS *Award and Payment Report* when considering support
  - On a monthly basis, review tuition in arrears reports in FACT Tuition Management
  - Use FACTS tuition reporting to identify accounts falling behind
  - Contact families early and often to offer support. Reschedule payment dates if needed.
  - Assess individual hardship cases for permanent solutions, be a help to them when parents are in need.

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MESSAGE - FIND CLARITY AND CONSISTENCY IN YOUR MESSAGE.

Your child deserves a Catholic School.
__ Catholic Academy provides… a Foundation for Life.

- Communicate with localized focus for your school
- Think from the recipient's point of view: How can we help?

1. Help New families
2. Help Current families
   - Have lots of communication, be sure they feel as special as they are! Let them know what they mean to you.
   - State of the Academy
   - Deliver on the promises & provide great customer service
3. Help the PreK families to stay for Kindergarten
4. Help those with Financial need
5. Help those COVID concerns:

PLANNING FOR 2021 RECRUITMENT

This is a good time for us to recruit and grow

- **Message** – be clear, consistent, concise
- **Method** – focus on what's in your control, phone calls, emails, customer service
- **Measurement** – set goals, track the work, use the tools

METHOD:

- Incoming calls, emails, web forms
  - Audit your customer service steps from phone call/email to completed enrollment
  - Do the staff have all the support needed during these trying times?
  - Is the digital process easy, complete and in use (*See SchoolAdmin page)
- Outgoing calls:
  - Calling your prospects via phone is one of the top actions to take to make a difference.
  - Assign this to a person, have them schedule an hour day to do this.
- Virtual Tours / Information sessions
  - Parents are turning up big time for ZOOM meetings.
  - Create your slide show, prepare your 'tour script' for a virtual presentation (keep it under 20 minutes!)
- Referrals
  - Ask your happy parents to help.
  - Create a social medial post, ask your parents to share it on their timelines.
  - *Parents like you make the difference, please share this and help us help more deserving families like yours! (and the post to share is the invite to attend a virtual open house)*

MEASUREMENTS: INQUIRIES> TOURS> APPLICATIONS> ENROLLMENT

- SchoolAdmin
  - Who is assigned responsibility for recruitment? Are they using SchoolAdmin?
  - The platform receives inquires, emails automated follow ups, reminders to apply…
  - Easy communication to groups and targets
  - You can see at a glance progress being made with the # of leads, # of applications, # of continuing re-registrations
- ***Principal, Board Chair, Recruitment staff… should complete an online inquiry and application as a test. (use the name '*Test*, *Test*') to experience the SchoolAdmin platform (and assure your school set up has been completed. Everything is customizable to your location and needs)

AREAS WE CAN IMPACT:

Pre-K For All | Financial | COVID related | Happiness ☺

Concentrated efforts should take place to help families
with the more 'controllable factors".
For the greatest impact action plans to recruit AND retain should include:

- ☐ Efforts to recruit the **Pre-K For All population** into Catholic Kindergarten programs
- ☐ Early intervention to problem solve those with **Financial** concerns
- ☐ Outreach those who left for **COVID** reasons, to help them return
- ☐ Improved communication & problem solving to resolve frustrating issues

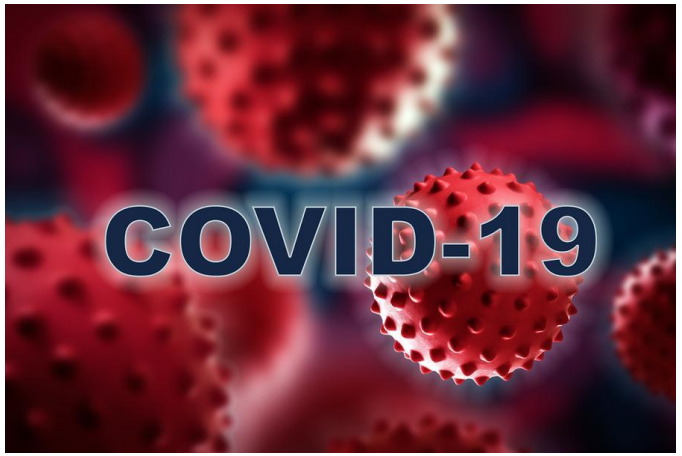
ACTIONS FOR: PRE-K FOR ALL TO KINDERGARTEN

Actively and consistently recruit the Pre-K For All population into Catholic kindergarten.

You can (and should) include your Pre-K For All parents in your community.

1. Make sure the parents **feel part of the family and wanted** in the Kindergarten class. Invest time and energy in:
   - 'Pre-K to Kindergarten' support groups, newsletters, networking with HAA
   - Special virtual information sessions on what to expect in the Catholic Academy kindergarten.
     - Why it's a great option,
     - Benefits to parent and child,
     - How to apply for scholarships - online workshops
2. **Do the children want to return** to your Catholic Academy? What was done to assure the children want to stay?
3. **Engage & partner with Pre-K For All Directors and Teache**rs
   - Support and help the Pre-K For All team.
   - And, be sure the parents know other faces of the school: Principal, Kindergarten teachers, staff, HAA leaders… People make decisions based on people.
4. **Act early** – have events and 'early registration' ahead of NYC Kindergarten registration
   - Offer priority kindergarten seating, or other reasons to commit now

ACTIONS TO TAKE FOR: COVID RELATED



- Within those that left us due to COVID related concerns:
  - Can we assume they would have remained if not for COVID?
  - Is their 'plan B' working out?
  - Do they know the success you had in a safe reopening?

  Let's find out!

- Assign someone who is motivated toward results and skilled with interpersonal communications.
  Have them contact those that left last year, to *check in on them.*
  - Show them we care; we miss them, and we want to know how they are doing.
  - Since these families are not in our schools right now, but once were…
    Invite them back to events (as possible) like family Masses and Christmas related celebrations. They may be missing their Catholic Academy family or having a hard time in the new situation.
- Hold special virtual meetings for those who left and need help.
  - *Partner or refer them to Faith Formation / DRE for those that can not return to school, but need to continue the journey of faith for their children*

CUSTOMER SERVICE CENTERED APPROACH

Make every day
Happy Parents Day

- Catholic Academies and Parish Schools should take pride in their parent focused, positive & approachable environment.

Part of our mission is to make life better for our parents and children.

  - In most cases this is happening and making all the difference.
  - COVID and our ‘new normal’ has tested the limits of nearly all business processes. It may be time to check ours.

- First point of contact -
  - When you need to call the school, use the main line. (to experience what the parents experience)
- Processes – continue to adjust and assess for social distancing and the need to turn everything you can into a digital solution.
- Escalation and reporting -
  - When there is an issue, is it quickly being referred to decision makers empowered to resolve?

REDUCING ATTRITION – ACTIONS TO TAKE FOR: NO RESPONSE, OTHER, UNHAPPY

- Parents are at the school daily. They trust us with their children.
  Notwithstanding COVID related issues, we should be able to have contact and conversation with every parent regarding their children,
  - Improve communication to problem solve now. Not just at time of withdrawal.
  - Assure the team has a paradigm of customer service and support, especially during this uncertain time.

- At each school, there are likely a few well known factors causing pain and attrition.
  Pick one, or two, and solve them for your parents.

COVID chaos created change –

Let's harness the power of change. Now is the perfect time to make an impact.