

# DIOCESE OF BROOKLYN

## Year-End Processes: Celebrate, Evaluate, Strategize, Plan

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Events Work Plan Spreadsheet](#)



# OVERVIEW OF TODAY'S SESSION

Take time to look back:

- Celebrate the “wins”
- Evaluate for improvement

Strategize for the coming year:

- Set some goals (not just numbers)

Plan the work then work the plan:

- Identify anchor event
- Backward planning

Don't forget the summer!

- Stay in touch to secure commitments and keep engagement high!

# CELEBRATE: What went well?



Take time to review the previous year.

First: What went well?

What were the “wins”?

Did you hit goals?

Launch new initiatives?

Try new marketing techniques?

Use a work plan?

# EVALUATE: What could be improved?



Take time to review the previous year:

What missed the mark?

What has run its course?

Are we communicating the right message to the right audience at the right time?

Did we use data to adjust strategies?

Write it  
down!  
(I'm not  
kidding...  
write it  
down!)



Big Picture Numbers (total = # retained + # recruited)



Events and activities (number, attending, timing, audience)



Marketing (messaging, features vs. benefits, social media, website, budgets, new markets, etc.)



New initiatives (adjusted timelines, incentives, etc.)

# Set Goals

Goals need to be SMART  
And not all goals are  
numbers...



# Plans support the achievement of goals

ENROLL



**EXAMPLE:**

**NOT a SMART goal: “Grow Enrollment”**

**A SMART goal: To grow enrollment this year, we will:**

**SPECIFIC:** Focus on maximizing the PK and Kindergarten classes

**MEASURABLE:** We will reach this goal by having 18 in PK 3, 28 in PK 4, and 36 in K.

**ACHIEVABLE:** We believe this is achievable based on historic retention rates and the number of families on our baptism lists with children ages 3-5.

# Plans support the achievement of goals

# ENROLL



**RELEVANT:** We know that by maximizing Pk and K enrollment, we ensure a revenue stream and a tuition stream to keep the school fiscally healthy. We must reach these goals to cover related staffing investments.

**TIMELY:** Based on historical trends we believe we can reach this goal by the end of February through opening early enrollment for siblings in November, hosting one Early Education Information Session around CSW and following up with any additional inquiries.



# The Beauty of Backward Planning

- Difference between a calendar and a work plan
- Visualize your workflow
- Delegate
- Avoid overload
- Be strategic in timing
- Hit deadlines
- Engage others in the process

# Backward Planning



Begin with your “anchor” events (examples):

New Student Orientation (July)

Back to School Picnic (August)

Back to School Night/Meet the Teacher (September)

Fall Information Sessions (November)

Opening Re-registration (November)

Catholic Schools Week (January)

Acceptance Announcements (February)

Spring Information Sessions (March)

Accepted Student Day (May)

# Plan the Work and Work the Plan



Example: You're planning an information session on November 15.

What are your goals? (attendance, new format, new market...)

What has to happen to achieve those goals? (promotion, revise the program, target marketing, registration, refreshments, set up, follow up, etc.)

Who is responsible for what?

# Don't forget the summer!



Just because school's out doesn't mean we can go silent for 2 months...

Develop a summer communication plan to keep your current and new families engaged!

## EXAMPLES:

- Summer newsletters
  - Early July
  - Early August
- Keep your social media going!
  - "Flat Stanley"
  - "Themed" Days
- Mid-July on-campus family event
  - Outdoor "Picnic and a Movie"
  - Family Game Night
  - Food Truck Festival
  - Parish Carnival or Picnic

# Don't forget the summer!



- Orientations
  - PK, K, new student transfers
  - Post-COVID scenario
  - Reduce anxiety
- Back to School Picnic
  - Typically right before school starts
  - Great job for PTA/HSO/Parent Ambassadors
- Buddy Families
  - Should be assigned before the end of the school year
  - Should have a point person to make sure connections are happening
- One-call
  - Independence Day
  - Important Church/Saint Days
  - “Count down to the first day of school”
- Website
  - It's audit time – it's also update time
  - People will still be visiting the website for information AND inspiration!

# Tools and Tips

TIP: If you haven't already, take time to do a year end review of your SEM successes and think about what you'd change this year. Involve all of the appropriate people on your team (formal and otherwise).

TOOL: Work plan template with suggested monthly activities. Make it your own!! Add in the backward planning for the activities you'll keep (and add others specific to your school). Plant your BIG goals at the top to remind you to stay focused.

# Q&R

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