



## **WI School Principal Student Enrollment Survey and Insight Report**

---

October 2020

Christopher Balow, PhD.  
Chief Academic Officer

**SchoolMint, Inc. Lafayette, LA.**

**TABLE OF CONTENTS**

Table of Contents.....	2
Executive Summary.....	3
Introduction.....	4
Background.....	4
Positive Impacts of a Robust Student Enrollment System.....	6
Survey Questions and Results.....	9
Improvement Strategies.....	18

## EXECUTIVE SUMMARY

School principals across the state of Wisconsin were surveyed to obtain their perspectives on enrollment practices and processes in their schools and districts. Understanding enrollment trends has become increasingly a highly strategic activity for school and district leaders due to the impacts of declining enrollments.

In Wisconsin, there has been a decline in overall K-12 enrollment of 5% over the past 13 years. The decline in K-12 enrollment was most evident at the high school level, with a 10% decline. The reasons for this decline are multifaceted, such as declining birthrates and net outward state migration. One of the major reasons that certain districts have experienced enrollment declines is the impact of open enrollment laws in the state. The most recent data from the Wisconsin Department of Public Instruction (DPI) for the 2017-18 school indicates that over 60,000 students are open-enrolled in districts other than their own. DPI also reported that open enrollment transferred \$419 million dollars during this year as students moved to other districts. This indicates that many districts are likely having serious negative economic impacts from declining enrollments, while other districts are experiencing increasing state aid dollars. Adding to these impacts for public K-12 districts is the fact 45,000 students attended physical charter schools and 7,000 students enrolled in virtual charter schools based on 2016-17 data.

Of the respondents, more than half of the districts surveyed offered transfer options for students and nearly 60% of the schools and districts surveyed have speciality program options for students. It is noteworthy that 65% of respondents indicated that there were significant percentages of their families that were uninformed or under informed about enrollment processes and requirements. Therefore, program knowledge and admissions processes are not universally known amongst families and this needs to be rectified by districts. These results indicate that a fairly serious accessibility and equity problem may be inherent in the enrollment processes of schools in Wisconsin. Efforts should be made to ensure all families are well informed about their options in the district in order to increase the likelihood of finding a program to meet their child's needs and remain in the district. Of those schools and districts with transfer and program option offerings, only 15% are using a lottery to place students and only a single respondent indicated the use of a digital platform to ensure application of weighted priorities. This can lead to errors and even bias in decision-making. 84% of respondents indicated they relied on printed guides about programmatic offerings and enrollment processes, which can lead to lack of access for some families and greatly increased costs for districts. On a positive note, the results indicated that universal registration forms are widely used. Finally, the results highlighted that a significant percentage of schools and districts have enrollment processes that are negatively impacting the financial status of these entities, such as spending excess funds on extra staff, staff spending inordinate amounts of time on enrollment, document printing and storage costs, and finally limitations in effectively balancing enrollments across schools.

## **Introduction**

The process of student enrollment in today's K-12 educational environment is more complex than ever before and has placed extant stresses on our schools and districts. The area of student enrollment in modern times goes well beyond simply registering a student in a class and now includes a number of important aspects such as marketing, recruitment, lotteries, special school choice, special programs, family involvement, and customer service. In many respects, today's forward-looking district leaders consider student enrollment a highly strategic endeavor that can impact nearly all domains of the educational system, including student achievement, student engagement, access, equity, financial stability, and overall administrative efficiency. In this report we will review several of these domains, the impacts on schools, and how using the newest software tools can help educators and families in the student enrollment process.

## **Background**

In the United States' K-12 education system, children have attended their neighborhood school through what has been referred to as a "residence-based school assignment system." Within the last 30 years however, often based on desires to change residential sorting by race and income, there has been a proliferation of school choice options which has dramatically changed the relationship between where a student lives and school assignment. The link between where a child lived and where a child attended school has greatly loosened during this time, as the number of public choice options (i.e., magnets) and particularly charter schools, have provided alternatives to attending one's zoned school (Mickelson, Bottia, and Southworth 2008). Additionally, there are what are referred to as "soft" forms of school choice, such as inter- and intradistrict transfer, ability-based (e.g., Gifted and Talented), and school voucher programs that have contributed to ramifying housing and educational markets (Brunner, Cho, and Reback 2012; Loeb, Valant, and Kasman 2011). A recent study by Snyder, de Brey, and Dillow (2019) found that nearly 30% of families now enroll their children in a school other than their assigned neighborhood school. Not surprisingly, the percentage of students moving out of their neighborhood schools is much greater in urban areas (Grady and Bielick 2010).

The greatest drivers affecting student enrollment today are open enrollment, general school choice, and virtual school options that are now available to families. In general, we can say that these drivers have changed the K-12 education into a "marketplace" which has made student recruitment and retention more challenging. Some of the main impacts upon this marketplace as outlined by LeRoy (2020) include:

- Demographic changes
  - Lowest birth rate in over 30 years
  - Families are having fewer children
  - Increased competition – charter growth
  - Increase in voucher money

- o Population shifts away from urban and rural areas
- Attitudinal changes
  - o Millennial generation
  - o Increased secularization and turning away from organized religion
- Economic changes
  - o The squeeze of the millennial generation with student loan debt, college costs, and retirement
- Marketing changes
  - o Traditional marketing sources producing less results
  - o Rise of social media has meant that you must communicate in a number of different channels (i.e., mobile-optimized website, Twitter, Facebook) to reach and satisfy your families
  - o Word of mouth remains the biggest driver
  - o Families require a high degree of personalization in outreach to result in enrollment

Given these factors, a paradigm shift is needed in education as it relates to the recruitment, enrollment, and retention of students. There is a prevailing sentiment among many educational leaders that students “belong” to their specific school or district. The fact is that families have a variety of choices today (e.g., neighboring districts, charter schools, private schools, homeschooling, and virtual schools) and the notion that some entity is “stealing” students simply is not accurate; another entity is simply offering something that is more appealing to families.

The enrollment process is no longer considered a singular act, but is a complex “family journey” with multiple data points being considered in the decision-making process. Nick LeRoy (2020) conceptualizes the enrollment journey that school leaders must address to include three broad domains of action and he recommends the following:

1. **Educate** – Control the narrative of your district or school by using your website to tell your story in such a way as to motivate further examination. This is a process of building “brand awareness” of the great things about your district or school. There are a variety of sources for school information (e.g., Niche) and the information available is often rather staid and can even be inaccurate. This is really about implementing the basics of marketing your district or school and “wowing” families. The notion of marketing in education may be abhorrent to some, but it is undeniably important today.
2. **Engage** – After families have been educated and choose to investigate your district or school, the most important thing is to establish a positive personal relationship and bond. Trust is the key and this can be established by a dynamic school tour that tells the story of an engaging day in the life of a student. Families want to be assured that their children

will be safe, happy, and receive a quality education with individualized support.

3. **Enroll** – The final step is getting families to finalize their decision to enroll in your district or school. Keep the lines of communication open and remind parents of the reasons why they initially liked your school. Have “family ambassadors” available that will contact the prospective family and share why they love your school. Don’t be shy, you are selling your district and school.

With the current competitive nature of student recruitment and retention, districts and schools need to make marketing an endeavor of senior leadership. Some educational entities even hire enrollment marketing professionals that can lead your district or school in aligning efforts to make sure everyone is focused on the target of increasing enrollment. This can include getting teachers, current parents, or even the students themselves involved. A marketing professional can lead a school-wide effort to mobilize every aspect of your community to ensure that you will be able to “find the next generation of students and families who will carry your school into the future” (LeRoy, 2020).

### **Positive Impacts of a Robust Student Enrollment System**

Having a comprehensive student enrollment process coupled with well-designed and efficient technology tools can have important positive impacts on four broad areas for your district or school.

1. **Customer Service** - As described earlier in this paper, customer service is now a critical element of high-quality districts and schools. A shift is necessary from viewing families as a basic commodity to a valued customer that should receive special personal attention and be treated with care and respect. Of course, customer service is evident in our personal interactions with families, as noted earlier, but it also is an important aspect of how they interact with our website and student enrollment processes and systems. Some of items the deserve consideration to improve customer service include:
  - Centralize enrollment activities in one place with consistent deadlines and timelines
  - Replace any outdated and inefficient paper enrollment systems
  - Employ intuitive software so families can:
    1. Have an easy experience navigating the online enrollment and registration system without the need to contact the district or school officeSeamlessly move between activities, such as submitting school applications, transfer requests, and completing students’ registration
    2. Utilize information auto populated into the system to avoid redundancy and reduce errors

- Communicate with families through emails and instant messaging to support and inform at each step of the enrollment and registration process
    - Provide online detailed information for families to explore about your district, schools, program options so they can determine the best fit for their students
2. Accessibility and Equity – Many higher-risk families today lack the time, resources, and know-how to gather and assimilate all of the needed information about the educational opportunities and options for their children. Therefore, it is incumbent upon districts and schools to provide the ability for these families to quickly and easily access this information. Equity for families in the enrollment process is threatened when they are unable to access the needed information and miss deadlines for applications. Additionally, districts and schools that run lotteries for limited-access schools or programs must ensure that these lotteries are run in a fair manner, without favoritism. Some methods to improve accessibility and equity include:
- Utilize a variety of outreach methods to parents including: digital, personal outreach by schools, partnering with other agencies or groups, door to door, advertising
    - Publish dates and timelines for applications, registrations, and lotteries aligned across all schools to avoid confusion
    - Provide detailed information available to families about your district and schools so they can choose the best option for their children
      - Consolidate detailed, consistent school information into one central online location that's easily accessed, and make print guides available as an alternative
      - Have a unified set of protocols for enrollment, transfers, and withdrawals across all schools throughout the year.
      - Ensure that lotteries that are adequately publicized
      - Ensure that lottery logics and processes are fair and transparent for all groups
3. Administration Efficiency – School districts and schools are always looking for ways to improve their processes and accuracy, save time, and be more effective in decision-making. Enrollment processes in many districts are handled with paper and intensive hands-on labor from staff, leading to inefficiencies and potentially inaccurate decisions. There are a number of ways in which schools can help reduce these inefficiencies:
- Implement a high-quality online application and enrollment software system to collect, analyze, and maintain enrollment data, as well as eliminate the need for managing paper forms throughout the process:
    - Streamline the process by providing online document uploading
    - Guides families through the online enrollment process to greatly reduce the number of phone calls to office staff

- o Monitor in real-time the entire process of enrollment, registration and placement and transfers with effective data reporting and analysis tools for all aspects of enrollment planning and decision making
  - o Easily maintain waitlists
4. Financial Stability – As noted earlier, open enrollment and other changes in the education marketplace has significantly impacted revenue for many districts and schools, making it very important for school districts to attend to enrollment from a financial stability standpoint. Additionally, a large percentage of school districts and schools across the country have faced cuts to budgets and personnel in recent years. In fact, 29 states provided less overall state funding per student in recent years. In 19 states, local government funding per student fell, adding to the damage from state funding cuts. In states where local funding rose, those increases usually did not make up for cuts in state support. With the emergence of the COVID-19 pandemic, almost half of the nation’s 13,000 school districts may be forced to make the deepest cuts to education spending in a generation—slashing programs and laying off hundreds of thousands of administrators, teachers and other staff—to fend off financial collapse brought on by the coronavirus. There are ways that school districts can achieve greater efficiencies in their enrollment practices and processes to help offset lost revenue due to lower student enrollment and budget cuts, while concurrently providing better service to families by utilizing an effective and efficient enrollment software system to:
- Support your marketing efforts to attract new students, and the associated funding, by helping schools “tell their story” to prospective families
    - Support your marketing efforts to retain existing students by informing families of special program options
    - Support the ability to efficiently balance enrollment across schools to maximize district or school resources
    - Reduce or eliminate the need for extra staff costs to manage enrollment paperwork such as receiving, copying, and filing.
    - Improve your models for predicting general school enrollment and/or specific program enrollment demands so you can make cost effective decisions
    - Reduce or eliminate the costs associated with printing school information flyers and enrollment packets

## Survey Results

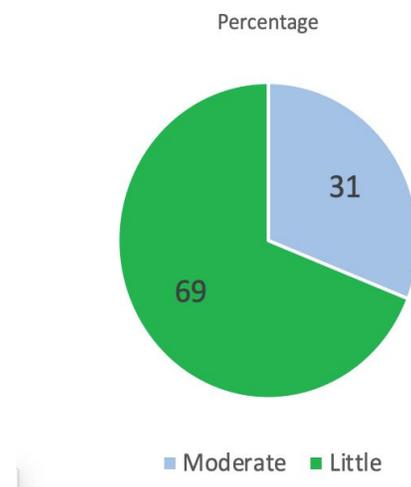
School principals from Wisconsin schools were surveyed in September and October of 2020 to gather their perspectives around student enrollment practices and procedures in their schools and districts. The survey categorized districts based on whether they allowed intra- or inter-district transfers (i.e., open enrollment, school to school) and whether they offered any special program options for students (i.e., magnet, dual language). The rationale is that district enrollment processes will be quite different based on these two major variables and the questions germane to each type of district will be somewhat different. This resulted in four different types of schools or districts:

1. Transfers = Yes – Program Options = Yes (26%)
2. Transfers = Yes – Program Options = No (30%)
3. Transfers = No – Program Options = Yes (18%)
4. Transfers = No – Program Options = No (25%)

Many of the survey questions are common to all four types of districts/schools and these common results are summarized around the four main enrollment system impact areas for schools and districts: customer service, accessibility and equity, administrative efficiency, and financial stability.

### **Customer Service:**

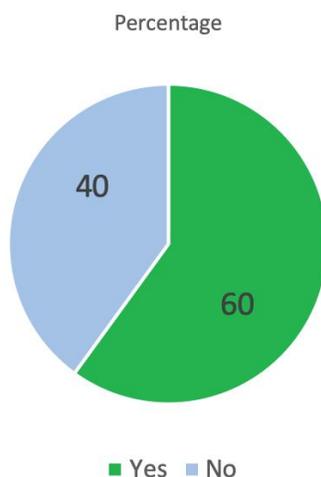
**Question 1:** How much time and effort (i.e., forms, driving to location, waiting) does it take for families to initially enroll into your school or district?



31% of families were reported to have to spend a moderate amount of time and effort in the enrollment process in districts and schools across Wisconsin. It is unacceptable that in this modern era, with easy and efficient digital tools for

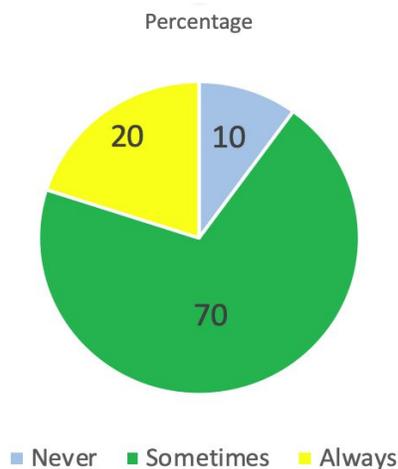
these processes, that 1 in 3 families would be burdened in completing these tasks. Generally speaking, the families that can least afford the time involved in enrollment processes will be typically underserved families, therefore creating disproportionate impacts. No principals reported that families would spend an “extensive” amount of time in these processes, which is a very positive finding.

**Question 2:** Can families initially enroll all of their students using an online form that consolidates the information making it simple and efficient for families to complete the process?



The survey results indicate that 40% of schools in Wisconsin do not have the capabilities to allow families to enroll all of their children using online forms that consolidate information across children. In this situation, a large number of families are being asked to enter the same information multiple times; a process which is inefficient and fraught with the potential for data errors.

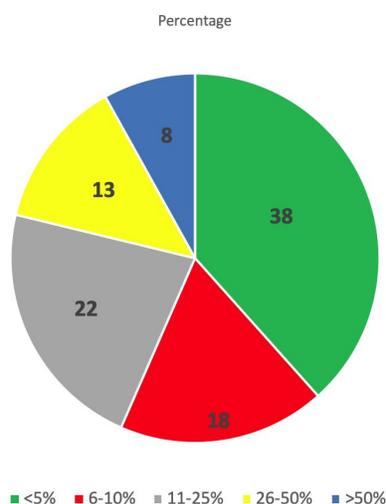
**Question 3:** Does your school rely primarily on printed guides about enrollment information and processes?



The survey results indicate that only about 1 in 5 schools are completely digital with their enrollment and registration information, while about 70% of schools utilize both digital and printed resources. A very positive fact is that only 10% of schools have only printed information available for families to support enrollment. Given the fact that essentially all families have a smartphone these days, the use of digital resources are much easier for them to access and utilize efficiently as opposed to printed information. With a combination of printed and digital resources, families may incorrectly think they have access to all the information via digital, when in fact there are printed resources required at the district or school level, potentially creating confusion and poor decision-making for families.

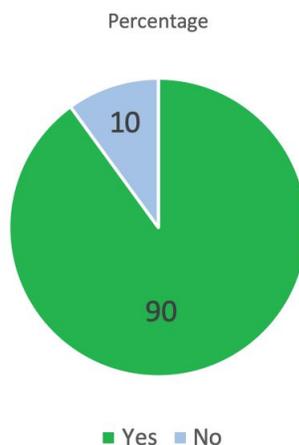
### Accessibility and Equity:

**Question 1:** What percentage of your families lack the time, knowledge or resources to access information about school choices and program options in your school?



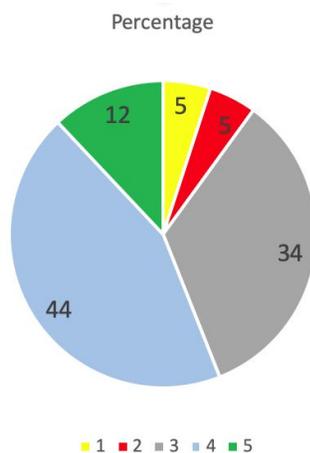
On average about 8% of Wisconsin schools have over one-half of their parents that lack the time, knowledge, and resources to access the needed enrollment and program information for their schools. While 13% of Wisconsin schools have between a quarter and one-half of their parents lacking the time, knowledge, and resources to access the needed enrollment and program information for their schools. 38% of schools in this sample had a rather small percentage of less than 5% of their families lacking the time, knowledge, and resources to access the needed enrollment and program information for their schools. Taken together, it is clear that a rather significant number of families in Wisconsin need greater support in enrolling their students and having all the knowledge and resources necessary to ensure their students are placed in the best school environment or program to meet their individual needs.

**Question 2:** Do all of the schools in your district have the same registration and enrollment forms and processes?



A very positive finding to support accessibility is that 90% of school leaders reported that they have the same registration and enrollment forms in all of the schools in their district. Only a small fraction of families will face the task of working with different enrollment forms and processes for their children, which can also impact equity for immigrant families with language differences.

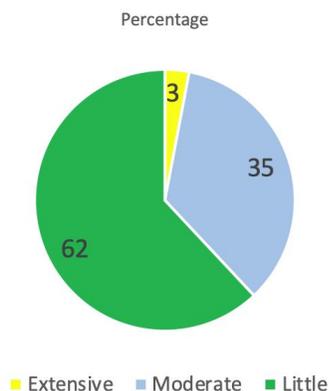
**Question 3:** How effective and efficient is your overall enrollment process with 1 being not effective or efficient and 5 being highly effective and efficient?



56% of school leaders report that their enrollment process is quite effective and efficient, and a total of 90% feel that their enrollment process is adequate or better. Only 10% of school leaders reported clear issues with efficacy and efficiency of their enrollment process, which is overall positive. However, there are roughly 875,000 students in the state of Wisconsin, which could translate into nearly 90,000 students being involved in difficult enrollment processes.

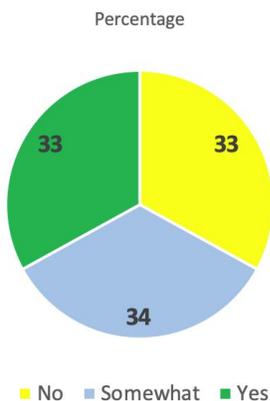
**Administrative Efficiency:**

**Question 1:** Does your staff spend significant time answering phone calls and emails from families around enrollment questions?



The survey results indicated that 35% of school personnel spend a moderate amount of time answering phone calls and emails from families about enrollment questions. When school staff are spending time, even a moderate amount of time, working through questions that could be answered through technology, they are spending less time working with students and performing other high impact activities.

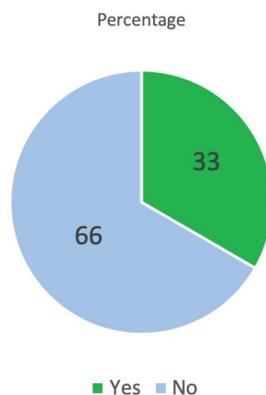
**Question 2:** Does your district or school have access to real-time dynamic reports of students in all phases of the enrollment process?



It is an interesting result that only one-third of schools and districts in Wisconsin have access to and utilize a full suite of dynamic data reports related to enrollment. Conversely, one-third of schools and districts do not leverage the power of enrollment data reports in their work, while the final third reported at least some level of reporting and analysis capabilities. As noted earlier, enrollment should be viewed by leadership as a highly strategic activity and having a real-time stream of data to inform these important decisions, such as teacher staffing, busing, program capacities, etc., are crucial. Much of this may

be managed manually, which is very time consuming and fraught with the potential for errors.

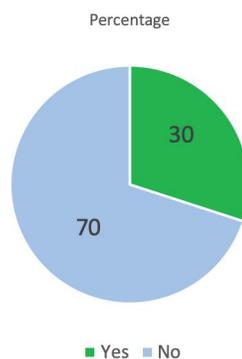
**Question 3:** Do school administrators need to take time away from their buildings to engage in enrollment meetings?



Many school principals have lamented being pulled from their buildings for various meetings at district offices. Principals have a tremendous amount of stress related to available time to complete their myriad tasks. When school administrators have to leave their buildings to work through enrollment and placement meetings, it takes away valuable time that could be allocated to being an instructional leader in the building. One-third of school leaders are in this situation, where they must leave the building to work on administrative enrollment tasks that could be completed automatically and remotely with the right technology solution in place. The positive news is that two-thirds of principals are not faced with this drain on their time. This is yet another example of time management, where a large percentage of principals could be spending more time as instructional leaders.

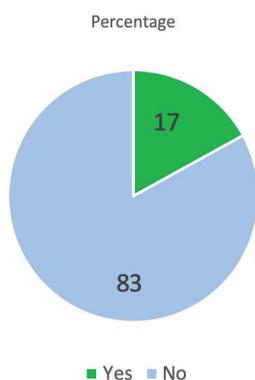
### Financial Stability:

**Question 1:** Does your district or school spend a significant amount of money on printed enrollment information, documents and physical storage?



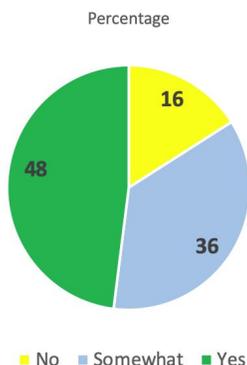
In an era where digital content is ubiquitous, this survey found that 30% of schools are still gathering paper documents and storing enrollment information and documents in physical storage such as filing cabinets. The accumulated costs related to staff time to manage these paper documents and for the physical space can be significant; in larger districts the document storage costs can be staggering.

**Question 2:** Does your district or school need to provide additional time and/or FTE's to manage manual enrollment processes and associated paperwork?



Associated with the preceding question, we find that 17% of school leaders need to hire additional staff to manage the documents and paperwork associated with enrollment. Even if a school does not need to hire additional FTE's to manage these tasks, existing staff will spend a significant amount of time in these processes, once again taking time away from activities that could more directly support the learning and development of students.

**Question 3:** Does your district have an efficient system for balancing enrollment across schools in your district?



Balancing enrollment across district schools can be a difficult, yet critical task in districts. Unbalanced enrollments can lead to disproportional student-teacher ratios and greatly impact educational outcomes. The survey indicated that less than one-half of school leaders reported having an efficient system for balancing enrollments and 36% reported having a somewhat efficient process. Finally, 16% reported not having an efficient method for balancing enrollments. Digital technologies offer the ability to track enrollment in real time so specific adjustments can be made efficiently in order to achieve enrollment balance across a district.

### **Special Situations:**

#### Transfers and Lotteries:

For districts that allow intra- and/or inter-district transfers only about 15% of school leaders reported utilizing lotteries and less than 5% of these districts reported using a technology platform to efficiently run these lotteries. This suggests that the lotteries being run in these districts have the potential to be error-prone, particularly if the lottery has complex, multi-level logic to determine acceptance into programs or schools. This also has the potential to bias the decisions for individuals or groups in unknown ways. Greater administrative efficiencies could also be achieved by having a technology platform run these lottery scenarios automatically, thereby saving an abundance of staff time.

Only 45% of school principals reported that they have an effective and efficient transfer request process and a little less than 50% reported that their process is somewhat effective. Clearly, a rather large percentage of schools and districts will spend an inordinate amount of time working through transfer requests, particularly if they are working with a strictly paper process. Additionally, only 55% of schools and districts reported having an efficient process for intra-district movement of students before and during the school year. This once again places additional time burdens on school leaders and potentially leads to unbalanced enrollments.

School principals reported that about two-thirds of families will have general ease in applying for programmatic offering in their districts that offer special programs and about one-third will have a sufficiently positive experience. No principals reported that families will struggle with program applications, which is a very positive finding. However, it is interesting to note that only about 7 of 10 schools utilize a digital platform, rather than a paper process, to notify families of enrollment and placement decisions, which can lead to time lags and perhaps notification errors.

#### Marketing Efforts:

As noted in the introduction to this report, it is essential for many schools and districts to be implementing a well-designed marketing program to support efforts to attract new students and eliminate attrition of existing students to other educational options. The financial implications of declining enrollment are immense so schools must “tell their story” to current and prospective families. Of the schools and districts that are involved in students moving to other educational options, only 17% reported have a well-designed marketing program and roughly 50% reported having a somewhat effective marketing program. 30% of schools in the category reported not having any marketing program to attract and retain students.

In conclusion, district and school leaders should strategically engage in processes to attract and retain students and reduce the likelihood that families will be lured by a plethora of attractive, and sometimes better-funded, educational choices. Public school leaders should not stand idly by and watch enrollments decline, leading to depleted budgets to fund student achievement. The first step is to provide a high-quality educational experience that will engage students at a deep level and meet the instructional needs of every child. In the modern age of social media, negative perceptions can be quickly shared and whether or not negative reviews are justified, they can quickly tarnish a school system’s reputation. However, school leaders can mitigate negative perceptions by providing more attentive and better customer service than other educational entities, which involve engaging and listening to the needs of families and using that data to improve. By addressing the important fundamental components of customer service, access and equity, financial stability, and administrative efficiency, districts can enhance their brand and improve the efficiency of the entire organization. In the end, these efforts will affirm to families that your school and district is their most desirable choice.

SchoolMint, Inc. is the leading provider of strategic enrollment management solutions designed to help districts attract, enroll, and retain students. Our innovative online software allows school and district leaders to improve branding and marketing, simplify all choice / open enrollment / transfer applications and placement processes, and streamline enrollment leading to improved parent satisfaction, reduced overall costs and increased administrator efficiency.

- *Dr. Christopher Balow from SchoolMint will provide your district or school a free 30-minute video conference to review these findings and discuss improvement strategies. Contact Dr. Balow at:*

[chris.balow@schoolmint.com](mailto:chris.balow@schoolmint.com)

651-210-5732