



# RECRUITMENT & RETENTION TOOLKIT

COLORADO CHARTER SCHOOL INSTITUTE

This collection of resources offers tips and tools to support with student recruitment efforts.

There are four sections:

1. Quick Reference Guide (p1)
2. Tips & Strategies (p6)
3. Resources (p13)

The Quick Reference Guide is meant to provide a broad overview of marketing; for in-depth explanations and ideas, visit the Resources section.

# QUICK REFERENCE GUIDE

## 1 Understand Your Data

The first step to creating a marketing plan is to understand your current recruitment and enrollment and historic trends. Questions to ask include:

- How many prospective families are we **recruiting** to learn more about our school?
- How many prospective families are **converting** to actual enrollments?
- How many existing families are **staying** at our school?
- How did we spend our money and what was its impact?

Consider these questions for your total enrollment well as for your grade level enrollment. To the extent possible, look at data across multiple years in case any trends can be identified.

Use available data to address each question. Data may come from your student information system or other systems used by your enrollment team.

If you aren't already collecting this data, make a plan to begin doing so!

## 2 Understand Your Local Context

The next step is to consider your local context. Questions to ask include:

- Are there **enough families in the area** to maintain/increase enrollment at your school? (Is the student-aged population in the area growing, stabilizing, or shrinking?)
- How do **area schools compare** to my school? Consider factors such as academic performance, offerings (think food service, transportation, before and after care, courses, grade levels), services and supports?
- What **changes are happening in the local community** (new schools opening, existing schools expanding or closing, planned housing developments)?
- What makes **your school stand out** from the rest?



CSI offers resources to help schools address these questions. CSI has completed several regional market analyses to help schools better understand the local school options around them and how they are performing. For more info:

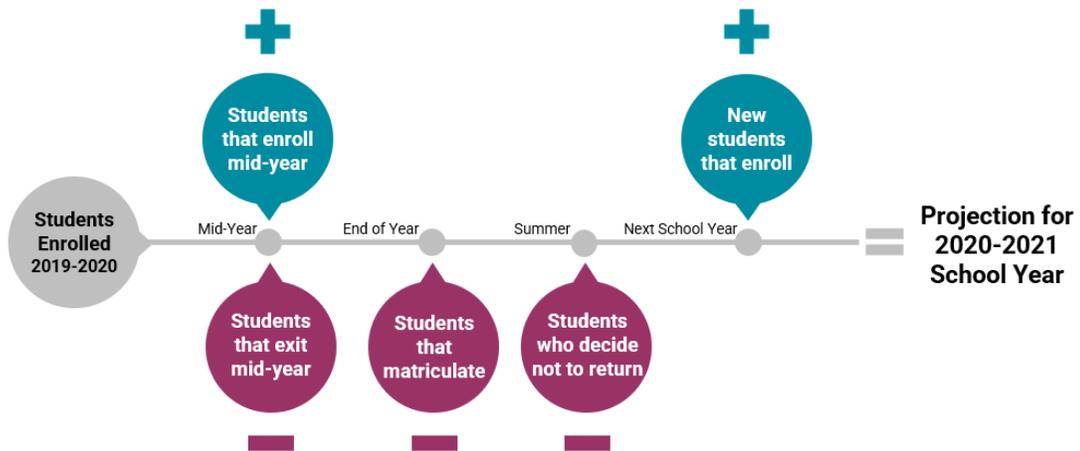
<https://www.csi.state.co.us/applicants/>

### 3 Set Realistic Targets

Answering these questions can help determine an area of focus (or focuses) for your recruitment efforts and allow you to set realistic targets. Will you focus on:

- Expanding reach to attract more new families (recruitment)?
- Increasing the number of prospective families that ultimately enroll and attend on the first day of school (conversions)?
- Keeping a larger number of existing families at your school (retention)?

Use the following exercise to figure out your enrollment projection, considering your current enrollment and the current data available on students that enroll and exit mid-year, students that matriculate, and students that don't return.



 CSI helps schools address these questions with the enrollment analysis tool provided during the budget projection process that takes place each spring. For more info: <https://resources.csi.state.co.us/enrollment-projections/>

In addition to setting the broad recruitment targets such as those referenced above, schools may consider more targeted enrollment goals such as a goal to ensure that student enrollment is reflective of the school's local community.

 CSI has developed a guide to support schools in setting diversity goals. For more info: <https://resources.csi.state.co.us/identifying-and-addressing-enrollment-barriers-for-multi-lingual-families/>

## 4 Develop An Action Plan

Once targets have been set, establish an action plan for achieving each target. The action plan should include:

- **Activities** for achieving the goal, including:
- **Deadlines** for completing each activity
- **Resources or tools** necessary to implement each activity
- **Person responsible** for completing each activity

Your action plan should consider both internal and external activities needed to support your goals. For example, while it's important to identify external-facing platforms and activities necessary for recruitment, it is also important to ensuring that front office staff have received the necessary training and that your enrollment policy and practices ensure your school is open to all. (Check out the Staff Training section below for more ideas on internal activities to support your recruitment and enrollment goals.)

This action plan should be referenced regularly throughout the year to ensure activities are being completed. Use a notes column to capture ideas and feedback to inform future activities.

The sample below is simplistic and should be added to or adjusted to meet the school's specific focuses. For example, while the overall action plan template may include a row identifying social media engagement, there may be an entirely separate spreadsheet (or calendar) outlining the various posts and engagement activities that will be done through social media.

**Goal:**

Activities	Deadlines	Resources	Lead	Notes

## 5

## Monitor Progress and Adapt as Needed

One of the most important parts of the enrollment plan is to monitor progress against the plan regularly and make updates as necessary. One way to do this is to regularly ask and dig deeper into the questions listed in Steps 1 and 2 above.

- How many prospective families are we **recruiting** to learn more about our school?
  - How are families learning about your school? This can help identify the most effective recruitment strategies to invest in.
  - Are there parts of the communities we aren't reaching as effectively? How can we address that?
  
- How many prospective families are **converting** to actual enrollments?
  - What are the reasons families identify as choosing your school? How can you use those to support your recruitment efforts?
  - Based on this conversion rate, do your recruitment efforts need to be increased, maintained, or even decreased?
  
- How many existing families are **staying** at our school?
  - How can your annual parent/student satisfaction surveys support your understanding of the reasons why families choose your school? How can you use those to support your recruitment efforts?
  - How can your school better understand why students are leaving your school? Do you conduct an exit survey for families that disenroll? Where are you tracking this information to identify any themes? How can this information help your retention efforts?
  
- How did we spend our money and what was its impact?
  - How do the activities your school invested in compare to how families learn about your school? Are you investing in activities that have little return on investment?
  
- Are there **enough families in the area** to maintain/increase enrollment at your school? (Is the student-aged population in the area growing, stabilizing, or shrinking?)
  
- How do **area schools compare** to my school? Consider factors such as academic performance, offerings (think food service, transportation, before and after care, courses, grade levels), services and supports?
  - Attending local school information nights and reviewing their websites for offerings can help in staying up to date with the local schools.

- What **changes are happening in the local community** (new schools opening, existing schools expanding or closing, planned housing developments)?
- What makes **your school stand out** from the rest?
  - Again, consider what families who choose your school and who remain at your school are saying. Use those characteristics in your messaging for recruitment efforts.
  - To what extent does your **enrollment policy support your enrollment goals?**
  - What barriers, if any, may prevent families from enrolling at your school?



CSI offers resources to help schools address these questions.

- [School Quality through a Multicultural Lens](#)
- [Identifying and Addressing Enrollment Barriers for Multi-Lingual Families](#)

# RECRUITMENT TIPS & STRATEGIES



## Word of Mouth

Schools commonly identify that word of mouth is the number one way in which new families learn about their schools.

Take advantage of this [free to low-cost] resource and involve your stakeholders!

Here are some ideas to get started!



### Encourage all stakeholders to spread the word!

- Give them yard signs
- Keep them in the know about recruitment events/opportunities
- Encourage family testimonials/reviews
- Provide sample content and messaging
- Remind them of where to direct folks (webpage, person)

### Consider establishing a Parent/Student Ambassador Program

- Have parents/students give school tours to prospective families
- Have parents/students call and/or write personal notes to prospective parents/students welcoming them to your school
- Considering including in your admissions package a list of your parent ambassadors with their child's grade level and phone number for testimonials and questions

To support your stakeholders in spreading the word, provide them the necessary resource to be successful! Such resources would include:

- ✓ Charter school facts (<https://coloradoleague.org/page/charterschoolfacts>)
- ✓ School fact sheets / marketing materials
- ✓ School achievements and awards
- ✓ Upcoming events
- ✓ Where to go for enrollment information (school contact, webpage)



#### Aligning Strategy with Goals

If your school is seeking to reach new student populations or communities or those that haven't historically been served by your school, it may be helpful to consider other strategies. Review **Community Outreach Considerations** later on in this toolkit!



## School Website

Your school's website can be an effective marketing tool. Here are some considerations for using your website to market your school.

### ✓ Include the Basics

- **Visual Appeal** – Use a design and layout that aligns with the school's culture and environment. The site should be appealing and easy to navigate.
- **Up to Date** – Regularly review and update the website as needed.
- **Basic School Information** – Include the school's mission, model, approach, grade levels, course offerings, etc. Highlight what makes the school unique.
- **Contact Information** – Use the header or footer to list the school's address, phone number, and email address so that it shows up on every page of your site.
- **Nondiscrimination Statement** – Include a nondiscrimination statement on the school's website.
- **Calendar** – Include the annual school calendar, upcoming events, and sports or extracurricular schedules as appropriate
- **Staff Information** – Include a current listing of school board members, school leadership, and staff.
- **Relevant Documents** – Link to important materials such as parent/student handbooks, board policies, bell schedules.
- **Social Media Links** – Link to any social media accounts to encourage families to like/follow accounts as an additional way to stay in touch.
- **Language** – Ensure your website can be translated or ensure key content and documents are translated into the primary languages of your community.

### ✓ Make Enrollment Information Easily Accessible

Your website should include:

- A clear description of the process for enrolling, including relevant timelines
- A clear description of the processing for enrolling students with disabilities
- Any pre-admission forms (such as intent to enroll forms). Be sure that such forms only ask for the minimum required information.
- Opportunities for families to learn more about your school (tours, information nights, shadowing, etc.)

## Sample Website Content

1. **Learn more about School ABC.** There are many ways to learn more about School ABC:
  - **Attend an info night.** Info nights are scheduled monthly on XXX from X to X.
  - **Schedule a tour or shadow day.** Contact X to schedule a tour or shadow day. School ABC is in session from XAM to XPM Monday through Friday.
  - **Talk to a current parent.** School ABC has parent ambassadors who can share more information about the school and why they have chosen School ABC for their own child. Contact X to get connected to a parent ambassador today.
2. **Submit a Letter of Intent.** School ABC accepts letters of intent to enroll all year long. Submit yours today!
3. **Complete Enrollment Form.** Completing the packet of enrollment paperwork ensures the school has the necessary information to enroll your child and that your child has secured a seat at School ABC.

Misinformation about charter school enrollment still exists. Combat it by being explicit about charter school enrollment at your school. Consider reiterating facts such as:

- Charter schools are public schools.
- Charter schools do not charge tuition.
- Charter schools use non-discriminatory enrollment practices.
- Charter schools, like all public schools, serve all students, including students with disabilities

There are no test-in requirements to attend charter schools.



CSI has guidance on addressing the enrollment of students with disabilities on school websites. For more info: <https://resources.csi.state.co.us/addressing-special-education-enrollment-on-school-websites/>



## School Social Media Platforms

Your school's social media accounts can also be effective marketing tools. Here are some considerations for using your social media to market your school.

- Post regularly – use a social media calendar to help you plan out regularly scheduled posts
- Vary the types of posts
  - Did you know?
  - A day in the life
  - Testimonials
  - Highlight what makes you unique
  - Accomplishments
- Build a base of followers
  - Encourage existing families to like your page
  - Invite those liking posts to like your page
- Use social media tools to increase your reach
  - Boost posts, use Facebook ads targeted to key demographics
- Link to relevant webpages



## Other Online Platforms

Consider other ways in which families can learn about your school online outside of your school's website and social media.

How are your ratings and/or reviews on sites such as Google and Yelp? What information is listed for your school on Great Schools, Niche, or US News?

- <https://www.greatschools.org/>
- <https://www.niche.com/k12/search/best-schools/>
- <http://www.usnews.com/education/best-high-schools>

Consider enlisting the help of your stakeholders to promote your school by leaving positive reviews and giving ratings.

If you use Google Analytics or a similar tool to monitor website analytics, look at the ways in which people are accessing your website. Where are they coming from? What words are they searching for when finding your website? This may provide helpful information on which websites are referring families to your website.

## Community Outreach Considerations

### □ **Gather feedback from the broader community.**

While it's important to keep a gauge of your current families, if you are seeking to expand enrollment to more communities, it is important to solicit feedback from broader a broader audience. Here are some ways to do that:

- Create a survey to send to the broader community (by zip code/region) asking about family priorities in a school
- Host listening sessions in nearby communities
- Ensure materials are translated to primary language(s) of your broader community

### □ **Consider (and address or mitigate) barriers to access.**

During these feedback gathering opportunities (and from feedback of families that learn more about your school but ultimately choose not to enroll), identify the reasons, or barriers, to enrolling at your school. Consider whether there are trends in these reasons and what the school and do to effectively mitigate these barriers. Some common barriers to access include

- **Transportation:** What transportation options are available to support students getting to and from school? Buses? Access to public transportation? Carpool system?
- **Food Services:** What food services are offered at your school—breakfast, lunch, snacks? Are fees waived for indigent students?
- **Before and After Care:** What before and after care offerings are available for families needing additional care hours?

## Staff Training to Support Recruitment Efforts

Staff who participate in recruitment efforts (whether marketing, answering the phone, giving tours, or supporting families in accessing the enrollment process) should all receive training to ensure quality and consistency in practices.

Here is a short list on some components that should be included in the training:

- **Know the school's enrollment policy.** This board-approved policy should outline the process used at the school for student enrollment.
- **Know basic facts about charter schools** broadly and about your charter school specifically.
  - For example, charter schools are open to all children and are tuition-free. A list of charter school facts can be accessed here:  
<https://coloradoleague.org/page/charterschoolfacts>
- **Know the people to refer families with questions to.** If your students and parents serve as ambassadors, they should be given the list of school contacts to refer families to if they don't know the answer to a question about enrollment, courses, extracurriculars, etc.



CSI's Charter School Enrollment Toolkit addressed frequently asked questions about charter school admissions and enrollment processes. For more info:  
<https://resources.csi.state.co.us/enrollment-policies-and-practices/>

## Student Recruitment Activities

Here's a list of ideas to support your student recruitment efforts!

- **Info Night / School Tour:** Invite families in the community to learn more about your school and what it offers.
  - Record who attended using Info Night survey cards: detailing the attendee information and how they heard about your school and the info night. This data can be used to help understand successful outreach venues and conversion rates.
  - Why limit the experience to those able to attend in person? Make virtual opportunities available to families through Facebook Live and YouTube videos.
  - Consider hosting info nights various days of the week and various times of the day to ensure its accessible to all.
  - Consider having school counselors attend to help students/families understand what a student schedule or graduation plan might look like
- **Have a Presence at Community Events:** Consider using community events as an opportunity to see your students and meet new families!
- **Target Feeder Schools Flyer:** Identify schools in your area that are feeder schools. Develop relationships with those schools and consider sharing marketing flyers, informing them of shadow days, info nights, coffee days, etc. to experience the community at your school first-hand.
- **Social Media Contest:** Challenge your students to create a one-minute video to “sell” your school; winners are posted on website/social media.
- **Student Shadowing:** Encourage prospective students to shadow currently enrolled students in for a day/part of a day to experience the culture and model of the school.
  - Be sure to have the prospective student fill out a shadow day survey. This should address:
    - The grade they are currently in
    - School they currently attend
    - How they heard about the shadow program
    - Where they are in the application process
    - Rate their shadow day experience
    - Suggestions for improving shadow day
    - What they enjoyed most about shadow day
    - Would they recommend shadow day to other prospective students?
    - If they do not plan on attending (the school), please indicate why
- **Schedule Social Activities:** Schedule play dates, picnics, ice cream socials to prospective families with existing families
- **Encourage Existing Stakeholder to Share their Stories:** Whether it's the School Leader, Administrators, Teachers, Parents, Students, encourage stakeholders to share their stories of why they chose your school and what makes it special. Highlight these stories in your newsletter, blog, website, video, etc.

## Student Retention Activities

Here are some ideas to keep your existing families engaged and at your school.

- **Student shadowing:** Have students in lower grades shadow students in upper grades for better understanding of upcoming transitions
- **Volunteer student leaders:** Have older students participate in younger students classes (PE, Art, etc.)
- **Student highlights bulletin board/wall:** Placed in the hallway or office of school building, where a school tour would walk by, spotlighting achievements of students, promoting the schools character education.
- **Teacher Swap:** Having teachers from one grade above swap with one grade below to allow the younger grades a chance to make connections with higher grade level teachers. The teachers who come in will make sure to have a “wow” presentation of the days’ subject matter—like a cool science demo, etc.

## The Importance of Regular Communication

- **Prospective families** may require multiple interactions before deciding whether to enroll their child at your school. Support them by offering regular touch points from initial outreach until their decision.



*from Charter School Growth Fund Enrollment Playbook*

- **Existing families** should also be receiving regular communications.
  - Consider sending teacher introduction letters at the beginning of the school year to develop relationships and set expectations
  - Send a regularly scheduled newsletter (school-wide and/or classroom-specific) that includes highlights from the past month and upcoming events
  - Encourage teachers to communicate regularly with families
  - Use a parent satisfaction survey to collect feedback on what’s working and how to improve your school experience. Be sure to communicate the results and actions being taken to address the feedback!

# RESOURCES

## **CSI Guidance & Resources**

- [Admissions and Enrollment Resources](#)
  - [Enrollment Policies and Practices](#)
  - Addressing Special Education Enrollment on School Websites
  - SPED Enrollment Procedures
  - Identifying and Addressing Barriers for Multi-lingual Families

## **PowerPoint Presentations**

- [Charter School Growth Fund Resource Library](#) (recommended guides linked individually)
  - [Planning](#) (How to build an integrated, data-driven student recruitment strategy)
  - [Generating Leads](#) (How to engage families through personal outreach and social media)
  - [Reducing No Shows](#) (Proactive and reactive plans for limiting last minute attrition)
  - [Maximizing Conversions](#) (How to guide families from inquiry through the first day of school)
- Colorado League of Charter Schools (2019): [Student Recruitment Tactics](#)
- Colorado League of Charter Schools (2019): [Student Recruitment Strategy](#)
- Colorado League of Charter Schools (2021): [A Guide to School Marketing, Enrollment, and Communications](#)

## **Toolkits and Templates**

- Aurora Public Schools: [School Communications Plan](#)
- Denver Public Schools: [School Marketing Toolkit](#)

## **Articles**

- Bright Minds Marketing: [Recruiting Students When You Are Starting A New Charter School](#)
- Bright Minds Marketing: [Marketing Plan](#)