

Virtual Advancement Summit Schedule

	Advancement	Development		Enrollment Management		Marketing & Communications		
MON • 7/27	11 a.m.–12:15 p.m.	How to Create a More Diverse and Inclusive Approach to Advancement with Gregory Simon	The Donor Cycle: Before the Ask—Identify, Engage, Evaluate with Harold Brown, Michael Christopher, Herb Soles, and L.J. Mitchell		Financial Aid Decision-Making in the Wake of COVID-19 with Amy Riley		Video Production for Everyone with Greg Abel and Robert Marley	What to Do When a School Crisis Goes Social with Penny Abrahams
	1:15–2 p.m.	Affinity Groups						
	2:30–3:45 p.m.	Leading a Team After a Reduction in Force with Andrew Taylor	Donor Retention: Love the Ones You're With! with Phil Higginson and Gigi Tysinger		International Student Enrollment: New Documentation Requirements with Jacqui Yamada	Shift to Continuous Enrollment to Boost Retention with Casey Bell	Launch a Blog That Generates New Family Inquiries with Clint Losch	
TUE • 7/28	11 a.m.–12:15 p.m.	Nurturing a Culture of Hospitality Across Your Campus with Greg Abel and Gregory Simon	The Donor Cycle: The Ask and Beyond—Solicit, Recognize, Steward with Harold Brown, Michael Christopher, Herb Soles, and L.J. Mitchell		Your Enrollment Management Team: The Shared Accountability Approach with Amy Riley		Create a Strategic Marketing Communications Plan With This Step-by-Step Guide with Penny Abrahams	Beware the Dangers of the Homegrown Survey with Barbara Beachley
	1:15–2 p.m.	Affinity Groups						
	2:30–3:45 p.m.	From Vision to Reality: Creating a Strategic Planning Framework for Your School with Michael Christopher and Steve Salvo	Rethinking Unrestricted Annual Giving with Phil Higginson and Gigi Tysinger		Empower Faculty to Be Frontline Recruiters and Re-Recruiters with Casey Bell	Insights From the Crisis-Driven Distance-Learning Parent Satisfaction Survey with Bryan Smyth	How to Create Your First Lead Magnet with Clint Losch	
	4–5 p.m.	MAP Pass Attendee Happy Hour						
WED • 7/29	11 a.m.–12:15 p.m.	Why Some Advancement Teams Thrive, While Others Just Survive with Harold Brown and Barbara Beachley	Your Annual Fund Adventure with L.J. Mitchell and Gigi Tysinger		Beyond Onboarding: Maximizing Engagement of New Families with Casey Bell and Herb Soles	Creating Buzz: Expanding Your Word-of-Mouth Marketing Efforts Through Ambassador Programs with Steve Salvo and Gregory Simon	How to Distinguish Yourself in a Competitive Marketplace with Amy Riley	
	1:15–2 p.m.	Affinity Groups						
	2:30–3:45 p.m.	The Role of Board Committees in Sustaining Your School with Michael Christopher	Do You Really Need to Do a Capital Campaign? Re-e-e-ally? with Herb Soles	Keys to Building and Nurturing a Productive Development Volunteer Corps with Harold Brown	Admission Funnel Forensics: Strategies to Increase Your Yield with Penny Abrahams and Steve Salvo		Google and Facebook Data: Here's What You Need to Know with Greg Abel	
THU • 7/30	11 a.m.–12:15 p.m.	The Head and the Board: Their Critical Roles in Advancement with Steve Salvo	Bring Order to Fundraising Chaos to Maximize Your School's Giving Potential with Penny Abrahams and Herb Soles		Your Primary Marketplace Stance in a Blended Learning World with Amy Riley	International Student Recruitment Do's and Don't's with Jacqui Yamada	Harry Potter and the Process of Branding with Greg Abel	
	1:15–2 p.m.	Affinity Groups						
	2:30–3:45 p.m.	Becoming a Change Agent: How to Lead When You're Not the Boss with Casey Bell and L.J. Mitchell	How to Create a Robust Alumni Program That Delivers ROI with Harold Brown	Searching for the Holy Grail: Defining, Establishing, and Nurturing a Culture of Philanthropy with Michael Christopher and Phil Higginson	On-Campus or Virtual School Day Visits That Dazzle! with Gregory Simon		How to Craft a Winning Social Media Strategy with Clint Losch	

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Virtual Advancement Summit Sessions

ADVANCEMENT SESSIONS

How to Create a More Diverse and Inclusive Approach to Advancement

Led by: Gregory Simon

Objectives:

- Expand your awareness and sensitivity to bias in your school's admission, development, and marketing practices
- Identify possible bias in your materials, processes, and approach to constituents
- Build a toolkit and set of resources critical to creating a more inclusive and equitable advancement function

Description:

Our nation and schools are becoming increasingly diverse, and independent schools lead the way in embracing that reality. Diversity, equity, and inclusion do not, however, stop at the admission process or classroom door. Representation in your materials and your approach to donors are just two examples of functions where bias can appear without intention. Leave this session on the path to ensuring a more inclusive and equitable approach to all your advancement efforts.

From Vision to Reality: Creating a Strategic Planning Framework for Your School

Led by: Michael Christopher and Steve Salvo

Objectives:

- Explore translating your school's vision and aspirations into a solid strategic planning framework that guides the work of your school and Board
- Learn to evaluate your school's foundational stability with ISM's Stability Markers™
- Discover how the strategic planning process should be realistic and practical, providing a tactical roadmap for achieving your goals
- Understand the role that your strategic financial plan plays in ensuring the sustainability of your school
- Learn to tie your advancement plan to the goals and aspirations of your strategic plan

Description:

The foundational component of a strong advancement program is a Board that thinks and acts strategically. In fact, aside from hiring the School Head, strategic planning is the key component of the Board's work.

This session provides a road map for translating your school's long-term aspirations into a practical strategic framework, using the foundation of the fifth iteration of ISM's Stability Markers™, the strategic plan, and the strategic financial plan. Leave with the tools to evaluate your current plan and begin to prepare your school for a robust and effective strategic planning process.

Leading a Team After a Reduction in Force

Led by: Andrew Taylor

Objectives:

- Explore the impact of various RIF methods on school staffing
- Understand important legal considerations when a RIF occurs in your school
- Discover how to engage and manage the faculty and staff who remain
- Learn to manage a second-order change in your department

Description:

Schools facing a significant decline in enrollment may find a reduction in force (RIF) is needed. This approach requires difficult decisions, ones that will affect friends, colleagues, parents, and students. Engaging in a RIF takes an emotional toll, but, for some schools, a RIF may be the correct path forward and a way to ensure the institution's future viability.

School leaders must understand this process, be decisive, act with empathy, and, perhaps most important, take responsibility. Explore how to move forward with care to protect your community.

Nurturing a Culture of Hospitality Across Your Campus

Led by: Greg Abel and Gregory Simon

Objectives:

- Understand and recognize the elements of excellent service within the context of your school community
- Develop strategies to ensure hospitality permeates every experience at your school

Description:

In today's independent school market, the customer experience is everything—positive customer interactions must be an intentional part of your school's culture. A customer service culture that is embraced by all employees of the school begins by examining the experiences your families have today!

You will determine what good customer service looks like at your school and identify obstacles that make it hard to achieve. This session provides concrete steps that you can implement at your own school to develop, sustain, and strengthen your school's customer service experience, resulting in better student retention and recruitment.

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Virtual Advancement Summit Sessions

Why Some Advancement Teams Thrive, While Others Just Survive

Led by: Harold Brown and Barbara Beachley

Objectives:

- Understand how to use Essential Expectations and Duties and Responsibilities to hire and evaluate outstanding faculty and staff
- Discover how mission, well-being, and leadership characteristics serve as a basis for professional growth and renewal
- Consider the characteristics of coaches that effectively promote professional growth

Description:

Schools today must align their enrollment management, development, and marketing communications strategies to effectively recruit and re-recruit families, support their communities, and serve their school's mission. To do this, school Leadership Teams must be able to identify the traits of outstanding advancement professionals and high-performing teams.

Join this session to learn what advancement professionals must possess to perform at a high level. Discover how you can identify these traits in new hires, as well as coach, mentor, and support those already at your school to help them unleash their full potential.

The Head and the Board: Their Critical Roles in Advancement

Led by: Steve Salvo

Objectives:

- Learn how your School Head and your Board of Trustees set the tone and direction for all aspects of advancement
- Explore strategies for fostering an atmosphere of open, honest communication and collaboration in all areas of advancement
- Clarify appropriate roles and responsibilities for the School Head, the Board of Trustees, and your advancement professionals

Description:

As School Head, you are responsible for ensuring that all advancement functions in your school are delivered with excellence. As a member of the Board, you are responsible for ensuring that resources are available to ensure the mission is realized.

The administrators involved with your school's advancement efforts should work with the other members of the Leadership Team to support and advocate for the strategic items within the Board's strategic plan and strategic financial plan. This will clarify their objectives, establish accountability for difference-makers in the life of the school, and ensure support from the Board. We will discuss ways to enable your advancement professionals to optimize the use of resources, provide the best service to students and parents, and drive the strategic function of the school.

The Role of Board Committees in Sustaining Your School

Led by: Michael Christopher

Objectives:

- Understand the composition and function of four important Board committees
- Explore ways that staff can support those committees and their work
- Consider case studies of committees whose decisions threaten the overall viability of the school
- Create steps for your school to support the work of Board committees more effectively

Description:

In this session we will explore the role that Board committees can have in sustaining financial viability and excellence for future generations of students. Central to that role is the Committee on Trustees, which profiles, evaluates, and supports Board members.

The Development Committee creates and promotes opportunities for the Board to provide resources for the future, the Finance Committee is the steward of those resources, and the Head Support and Evaluation Committee undergirds the Head's ability to meet the strategic goals of the Board. This session explores strategies that support the important contributions of these committees to sustain the work of the Board and the future of the school.

Becoming a Change Agent: How to Lead When You're Not the Boss

Led by: Casey Bell and L.J. Mitchell

Objectives:

- Understand the differences between leading and managing
- Identify ways to impact the culture at your school using influence rather than authority
- Learn effective strategies to create change and lead others, even if you're not their supervisor

Description:

Leading and making change is a whole lot easier if you're the boss, right? Maybe not! Someone with authority can certainly implement a top-down plan; leading others through influence is far more effective, creative, and impactful.

We will briefly explore leadership theories and discuss ways to create change within your school, no matter where you are on the org chart. Learn best practices to help you navigate leadership opportunities for you, your team, and your school.

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DEVELOPMENT SESSIONS

The Donor Cycle: Before the Ask—Identify, Engage, Evaluate

Led by: Harold Brown, Michael Christopher, L.J. Mitchell and Herb Soles

Objectives:

- Identify—Learn the steps to take to uncover potential donors; assess their connection, capacity, and intent; and develop strategies to further engage them
- Engage—Discover how to bring your donors into a closer relationship with your school
- Evaluate—Create methods for evaluating your donor's values and interests, and how they align with your school's mission and strategic goals

Description:

This session is a deep dive into the first three steps of the Donor Cycle, ISM's strategic approach to moving the donor into a closer relationship to the school. Participants will be given tools to help them discover the potential capacity and inclination of their prospects; explore ways to create an engagement plan with these individuals; and evaluate their interests, values, and financial resources. The tools will also assist in developing strategic approaches to persuade prospects to commit resources to your mission and programs.

Donor Retention: Love the Ones You're With!

Led by: Gigi Tysinger and Phil Higginson

Objectives:

- Understand the value proposition of keeping the donors you have
- Identify engagement strategies to help retain current donors
- Show your Leadership Team and School Head how to steward donors at all levels

Description:

Retaining your current donors is an essential part of a robust giving program. These loyal donors are the foundation for growing your annual giving program and provide the best opportunity for major gifts. This session explores the arena of retention strategy—the ability of the school to develop and appreciate those who give persistently, whether small or large sums. We explore strategies for designing and implementing stewardship plans that consistently engage your most loyal donors. *This session is appropriate for experienced development professionals and School Heads.*

The Donor Cycle: The Ask and Beyond—Solicit, Recognize, Steward

Led by: Harold Brown, Michael Christopher, L.J. Mitchell and Herb Soles

Objectives:

- Solicit—Invite investment in your mission through various strategies based on your programs, goals, and volunteer and professional leader resources
- Recognize—Show appreciation to donors and honor their generosity
- Steward—Commit to keeping donors connected to your mission between solicitations

Description:

A study of the second three steps of the Donor Cycle, we will examine the process by which development professionals solicit donors, honor their generosity through donor-centered recognition, and maintain long-term relationships with donors based on their interests and values. Covering the second half of the Donor Cycle, you will learn about the strategic approaches to engaging donor support now and sustaining that support until the next ask—and beyond.

Rethinking Unrestricted Annual Giving

Led by: Gigi Tysinger and Phil Higginson

Objectives:

- Differentiate between the annual fund and annual giving
- Understand the foundational questions that motivate schools to need unrestricted gifts, and motivate donors to give according to their values and interests
- Learn strategies for raising money annually that are more appealing to your donors, but also help meet your school's revenue goals

Description:

For many schools, the annual fund exists for a single purpose—to underwrite operating costs and relieve upward pressure on tuition. Traditionally, we ask donors to give unrestricted gifts to offset those costs.

Imagine an annual giving program not designed to balance the budget, but rather designed to offer donors the opportunity to give according to their values and interests. Learn to differentiate between these two approaches, find new ways to present your case for support, and deepen your relationship with your donors. *This session is appropriate for experienced development professionals and School Heads.*

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Your Annual Fund Adventure

Led by: L.J. Mitchell and Gigi Tysinger

Objectives:

- Consider annual fund questions and challenges
- Explore strategies and solutions to personally connect (or reconnect) with donors
- Create action items in real time around participants' needs

Description:

New obstacles and unexpected detours require that schools adjust their short-term plans relating to the annual fund. This session explores clear and appropriate strategies for stewarding annual donors so that they are poised to support you when the timing is right. Bring your questions and current roadblocks. Leave with a clear road map to turn your annual fund into an exciting, results-driven, and sustainable foundation of your school's fundraising program.

Do You Really Need to Do a Capital Campaign? Re-e-eally?

Led by: Herb Soles

Objectives:

- Discover if a capital campaign is the real solution to your fundraising needs
- Fully understand how the elements of a campaign will directly affect you and your school's faculty, Leadership Team, and constituencies
- Learn how to analyze your campaign readiness
- Explore the alternatives to launching a campaign

Description:

Almost every school at some point will need and seek capital funding to reach their vision. All too often the apparent solution is to launch a capital campaign immediately. But there are several key questions to ask yourself before launching a campaign.

First, does your school have the financial capacity to reach the goal? Second, do you have the ability to manage a successful campaign? Learn from an experienced campaigner how to avoid many pitfalls as we help you carefully explore where you are and what your next steps should be to ensure your school's success.

Keys to Building and Nurturing a Productive Development Volunteer Corps

Led by: Harold Brown

Objectives:

- Learn how to recruit, hire, train, inspire, and steward volunteers
- Create engaging volunteer job descriptions and evaluations
- Devise leadership succession plans

Description:

The adage "time is money" provides the context for this session. A volunteer's time in 2019 was worth \$25.14 per hour or more than \$50K each year. Make no mistake—volunteers are valuable members of your school's workforce.

Does your school reflect that value? Do you (and should you) differentiate between the way you engage your staff and your volunteers? How are volunteers integrated within your team? Do your volunteers understand the role of the development operation at your school? Would they describe their work as "vital" or "essential" to achieving your goals? Learn the answers to these questions and more, leaving with the tools to build and sustain a powerfully engaged volunteer corps of partners in your development operation.

Bring Order to Fundraising Chaos to Maximize Your School's Giving Potential

Led by: Penny Abrahams and Herb Soles

Objectives:

- Identify the full scope of "asks" being made of your families
- Learn to focus volunteer efforts to maximize return on investment
- Understand how to secure Board and Head support to ensure success

Description:

Are your families experiencing donor fatigue? Or even worse, donor exhaustion? This session will help you pinpoint the root of the problem through a diagnostic tool to identify how many times your families are being asked for money each year.

Armed with this information, you can get your school leadership on board with a plan to reimagine your fundraising strategy and amplify your culture of philanthropy. You will also learn how one school applied this approach to streamline its multitude of "asks" to increase its annual fund by more than 400% in just four years.

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How to Create a Robust Alumni Program That Delivers ROI

Led by: Harold Brown

Objectives:

- Identify frameworks for defining and tracking alumni at your school
- Learn strategies for keeping alumni connected to your school and to each other
- Evaluate your current alumni efforts

Description:

The relationship between your school and its alumni is lifelong. Alumni are impacted by schoolwide communications and there are opportunities to engage them across every facet of your operations. Whether your school is a boarding school with a large and active alumni body or a small K–6 school, a robust alumni relations program can engage your school's graduates at every phase of their lives.

Your program should be respectful, transparent, and grounded in supporting and fulfilling the mission of your school. This session provides you with tools to identify and strengthen the lifelong relationships between your alumni and your school.

Searching for the Holy Grail: Defining, Establishing, and Nurturing a Culture of Philanthropy

Led by: Michael Christopher and Phil Higginson

Objectives:

- Learn the distinct attributes that characterize a culture of philanthropy
- Explore ways to evaluate the unique culture of philanthropy in your school
- Develop strategies to enhance and nurture your school's culture of philanthropy

Description:

A “culture of philanthropy” has traditionally referred to the degree to which members of a school's community give back to the school through financial support. Frequently we refer to that “culture” without really knowing how to define or evaluate it. This session explores a wider definition of philanthropy. Attendees will learn to use a developing set of metrics and objective tools to evaluate their school's unique culture and interactively create a plan to improve and enhance it. *This session is appropriate for experienced development professionals and School Heads.*

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ENROLLMENT MANAGEMENT SESSIONS

Financial Aid Decision-Making in the Wake of COVID-19

Led by: Amy Riley

Objectives:

- Identify the primary assumptions at work in your school's financial aid decision-making, and analyze the aid you're offering
- Calculate your school's net tuition revenue per student
- Determine if your school is under- or over-using financial aid
- Craft a corrective strategy that imagines both: (a) the need to manage a pre-existing condition of over-discounting; AND (b) the need for additional "rainy day" financial aid in a COVID-19 world

Description:

Many schools are attempting to mitigate soft, flat, or declining enrollment by offering more financial aid to more students. You may be appropriately "means testing" all your financial aid applicants. But, if the awards offered exceed the recommended family contribution (as determined by your application process), you diminish the value of your program, rob deserving students of the assistance they need, and likely deprive your faculty and staff members of suitable raises and an appropriate suite of employee benefits. Even worse, you may be eroding your school's long-term financial viability—and not even know it. Leave this session with a multifaceted plan to realign your school's financial aid allocations to increase net tuition revenue per student—while still providing for a temporary increase in "rainy day" aid in our current COVID-19 economic climate.

International Student Enrollment: New Documentation Requirements

Led by: Jacqui Yamada

Objectives:

- Learn the new documentation requirements for international students seeking entry and re-entry to the U.S.
- Understand the accompanying reporting requirements for schools given the increased documentation
- Understand how to meet these requirements by making a slight shift in staffing without the need for new hires

Description:

The marketplace of international enrollment has always been characterized as rapidly changing but today, amid COVID-19, it may seem too unpredictable for even the most seasoned school professionals. How will your school adequately respond to the new demands in documentation? How will you appropriately advise your international students as you are on a new path yourself? Take the time now to prepare for the shift that is necessary with program staffing and messaging so your school is at the forefront of being strategic and student-centric with your international enrollment.

Shift to Continuous Enrollment to Boost Retention

Led by: Casey Bell

Objectives:

- Learn the continuous enrollment concept
- Understand the steps, process, timeline, and intricacies of continuous enrollment
- Articulate the benefits of continuous enrollment
- Develop a plan to roll out continuous enrollment and work with all departments at your school

Description:

Continuous enrollment, perpetual enrollment, opt-out enrollment—whatever you call it, the idea of enrolling a family into your school community "for life" is an idea that is growing in popularity among private-independent schools and has significant merit.

Imagine freeing up your Admission Office to serve your inquiries and applicants rather than chasing down re-enrollments. In this session, we cover the basics of continuous enrollment AND what to do in subsequent years.

Your Enrollment Management Team: the Shared Accountability Approach

Led by: Amy Riley

Objectives:

- Learn why shared responsibility and accountability is essential to enrollment management success
- Discuss who should serve on the Enrollment Management Team and why
- Identify the types of data your Enrollment Management Team will collect and analyze—and how to use that analysis to inform your Enrollment Management Plan

Description:

When the private-independent school industry shifted toward enrollment management to ensure strong recruitment and re-recruitment outcomes, little, if anything, really changed in the alignment of faculty and staff roles and functions in service of that new mind-set. Discover how to establish an Enrollment Management (retention) Team. This team consists of staff members from all areas of a school's operation, particularly those roles/functions that hold primary and direct responsibility for students' and parents' day-to-day experiences. Explore how this proven strategy produces measurable re-enrollment results.

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Empower Faculty to Be Frontline Recruiters and Re-Recruiters

Led by: Casey Bell

Objectives:

- Understand the importance of faculty in recruitment and re-recruitment
- Learn the preferences and meaningful ways to connect with today's independent school parents and equip faculty with the knowledge and resources to implement them
- Construct a plan for communicating with faculty the importance of their participation in the retention process

Description:

Imagine expanding your admission team to include your entire faculty! Teachers can be your strongest tool in recruiting and re-recruiting students. In this session, we discuss meaningful strategies your faculty can employ that will increase engagement and retention AND ways to actually get your faculty to participate!

Creating Buzz: Expanding Your Word-of-Mouth Marketing Efforts Through Ambassador Programs

Led by: Steve Salvo and Gregory Simon

Objectives:

- Learn how to articulate concise, distinguishable, and effective word-of-mouth marketing messages
- Explore how to construct a plan for identifying, recruiting, and training school ambassadors
- Determine how ambassadors and word-of-mouth marketing efforts can be used at various stages of the recruitment and re-recruitment cycles

Description:

Word-of-mouth referrals typically generate 80-90% of the admission inquiries at private and independent schools. Do you know what people are saying about your school?

As advancement professionals, we must ensure these critical marketing messages are accurate, compelling, and being voiced and heard by the right people at the right time. A primary and most cost-effective methods for doing so is through ambassador programs. These volunteer-based programs are relatively easy to implement and can greatly expand and enhance your school's unique differentiators throughout various stages of the recruitment and re-recruitment cycles.

Insights From the Crisis-Driven Distance-Learning Parent Satisfaction Survey

Led by: Bryan Smyth, Ph.D.

Objectives:

- Discover insights into how parents' felt about schools' responses to the crisis and the various elements of the crisis-driven distance learning experience
- Learn the impact on enrollment intentions and value perception
- Identify elements of the learning experience that resulted in increased or stable value perception

Description:

The COVID-19 pandemic immediately changed the way students are educated, placing schools in a crisis-driven distance learning model. Schools, and divisions within schools, designed different remote learning models. Many schools are wondering about the impact this crisis will have on future enrollment and value perception. We hypothesized that the clarity of the communication and the quality of the crisis-driven distance learning experience would significantly influence the value perception of a school. In this session, we discuss the results of our study and share insights into the communication and distance learning strategies that preserved or improved value perception.

Beyond Onboarding: Maximizing Engagement of New Families

Led by: Casey Bell and Herb Soles

Objectives:

- Articulate a compelling reason to engage in strategic onboarding of families
- Identify mission-aligned opportunities to harness the cooperative power of the Admission and Development Offices to enhance the student experience
- Create a toolbox of resources and strategies that you can use at your school
- Explore how to avoid moving too quickly

Description:

Admission teams spend countless hours recruiting and enrolling new families. Then, once the contract is signed, those parents and students are often left to their own devices and the Development Office must establish its own relationship.

In this session, we explore ways the Admission Office can join forces with the Development Office to ensure a seamless and supportive transition. Learn how the most successful development and admission programs identify and involve parents—from the beginning—to become future leaders in their schools.

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Admission Funnel Forensics: Strategies to Increase Your Yield

Led by: Penny Abrahams and Steve Salvo

Objectives:

- Understand the admission metrics you should track
- Learn how to use your admission data to diagnose gaps in your process
- Discover ways to improve your relationship management efforts with prospective families

Description:

Every school aims to fill its seats and build wait pools. But how can you get there if you don't know where to begin? This session introduces a simple method for using your admission funnel data to identify where your team should focus its efforts to boost enrollment. With your trouble spots identified, we discuss customized strategies to address your challenges and ensure your prospective families get what they need during each step of the admission process.

Your Primary Marketplace Stance in a Blended Learning World

Led by: Amy Riley

Objectives:

- Discover your school's primary competitive edge in the marketplace
- Discuss the impact of remote learning on your primary marketing claims and value proposition
- Identify ways to adapt your messages to ensure you remain an educational influencer in a blended learning world

Description:

Was soft or declining enrollment keeping you up at night before COVID-19? A primary root causes may be a lack of clarity about your primary marketplace stance. The result is often a lack of consistency or efficacy in the way that students experience your school. Add the sudden introduction of remote learning and you have an immediate need to evaluate your claims and the student experience to ensure you remain an educational influencer in a blended learning world.

International Student Recruitment Do's and Don't's

Led by: Jacqui Yamada

Objectives:

- Learn some of the best strategies and tactics to recruit and retain mission-appropriate students
- Understand the costly missteps you must avoid in recruiting internationally
- Strategize on how to leverage some of your current staff to employ "armchair" recruiting

Description:

The international enrollment marketplace has always been characterized as rapidly changing but today, amid COVID19, it may seem too unpredictable for even the most seasoned school professionals. Is your school prepared to recruit international students effectively in this new landscape? What are some traditional recruitment methods that are no longer available and may not return as we knew them? How will your school redirect your recruiting efforts to be the most efficient and yield good results? Participate in a session that will outline some important do's and don't's in international student recruitment.

On-Campus or Virtual School Day Visits That Dazzle!

Led by: Gregory Simon

Objectives:

- Understand the importance of designing tours, shadow visits, and events, whether in-person or online, that exemplify your Portrait of the Graduate and mission
- Build an inventory of ideas to optimize student and parent visits
- Create a framework for one of the following: refreshed and redesigned shadow visits, model tours, or admission events

Description:

If we just get families to see our mission at work, they will see how great it is here! We all hear that. We all believe it. But is it true?

We work hard to get families engaged in introductory events, such as tours, shadow visits, coffees, and admission series. Whether in person or virtual, is your school getting the most out of those events? How can you make sure the process is personal, convincing, and celebrates both your mission and Portrait of the Graduate? Learn how to thoughtfully design introductory events to maximize their impact on every student and every family.

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MARKETING COMMUNICATIONS SESSIONS

Video Production for Everyone

Led by: Greg Abel and Robert Marley

Objectives:

- Create a set of basic video production skills you can implement at your school or at home using Zoom
- Gain increased confidence that enables you to produce influential testimonial videos that will positively impact enrollment and fundraising

Description:

No budget? No problem! We will explore video techniques that EVERYONE can learn and apply right away. Learn how to use your smartphone to capture video that's engaging and high quality. With your new skills, you'll be able to film testimonial interviews, either in-person or via video conferencing, that can move the needle in your marketing efforts.

This session is ideal for beginners with no knowledge of video production. Discover how to tell your school story through video to drive interest, inquiries, and fundraising.

What to Do When a School Crisis Goes Social

Led by: Penny Abrahams

Objectives:

- Learn how to prepare for and mitigate a crisis on social media
- Explore the foundational components of social media reputation management
- Understand how to respond to a crisis that blooms on social media

Description:

You may feel prepared to handle the next crisis at your school, but are you ready if it spins out of control on social media? This session uncovers potential blind spots that could make your school more susceptible to a social media firestorm and offer steps you can take now to reduce your risk. We will also examine tools you can implement to monitor your school's social reputation and respond to negative comments and reviews when warranted.

Launch a Blog That Generates New Family Inquiries

Led by: Clint Losch

Objectives:

- Learn how to launch, and consistently post to, your blog, even if you are a one-person shop
- Explore the five types of content that you must focus on, and how you can create them without having to write a word
- Understand how to create content that parents want to read
- Learn how to repurpose your blog content for email, social media, and advertising

Description:

The simple fact is, schools need a blog today more than ever. Why? Because families are doing the most research about your school before ever stepping on campus.

You need a way to "pre-sell" them on your school. This session walks you through the steps to create an effective blog that drives engagement and generates new family leads. You'll learn to build your blog—or take an exciting one to the next level—by implementing a system that produces share-worthy, clickable content that brings in more traffic and converts more of that traffic into inquiries.

Create a Strategic Marketing Communications Plan With This Step-by-Step Guide

Led by: Penny Abrahams

Objectives:

- Learn how to take your marketing efforts from static to strategic
- Discover the key elements of a mission-based marketing communications plan
- Determine where to focus your attention and resources for the greatest impact

Description:

As a Marketing Communications Director, you may often feel that you are on a proverbial treadmill. As you juggle the multitude of emails to send, collateral pieces to design, messages to craft, and photos to shoot, it can seem challenging to keep pace or get any forward movement on your strategic to-do list. If this feels familiar, you are likely operating without a marketing communications plan to ground your efforts and provide a road map to success. This session offers an easy-to-follow framework to build a plan that is strategic, realistic, and results-focused. Templates and examples will be provided.

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Virtual Advancement Summit Sessions

Beware the Dangers of the Homegrown Survey

Led by: Barbara Beachley

Objectives:

- Understand the most critical mistakes schools make in survey design and how to avoid them
- Consider how survey designers' biases can hinder the effectiveness of a survey
- Learn how to avoid unintended communications or consequences that can result from survey initiatives
- Leave with an informed strategy for determining whether a homegrown survey can meet your needs and a process to follow in constructing it

Description:

Surveys can be an excellent way to collect data from your constituencies. However, we often hear stories about homegrown surveys gone wrong. In-house surveys can be fine for brief, targeted polls about specific initiatives, but surveys aimed at collecting more comprehensive data from entire sectors of the community require greater caution. In this workshop, we will explore the advantages and disadvantages of homegrown surveys.

Our discussion includes survey design principles that are essential to avoid setting false expectations, communicating a priority or bias, excluding one or more groups, or collecting uninterpretable or unusable data. Gain additional resources related to responsible data analysis and communication.

Harry Potter and the Process of Branding

Led by: Greg Abel

Objectives:

- Learn to adapt brand techniques from the Harry Potter franchise to guide your school's messaging efforts
- Extract core concepts from your school's Purpose and Outcome statements to inform your school's messaging

Description:

Independent schools can learn a lot from the world of wizards, muggles, and magical creatures! Through the lens of the Harry Potter universe, we will explore universal branding techniques. Hogwarts School of Witchcraft and Wizardry definitely does not have a Director of Marketing and Communications, and yet the school's enrollment is always filled. How do they do it?

Learn how to examine your school's mission statement, Portrait of the Graduate, and Characteristics of Professional Excellence, resulting in renewed excitement and motivation to brand your school and inform your school's messaging.

How to Distinguish Yourself in a Competitive Marketplace

Led by: Amy Riley

Objectives:

- Discover your school's primary edge in the marketplace—your graduates and what they do with their lives
- Explore the power of consistent messaging in ensuring everyone is on the same page, serving the same mission, and pursuing the same set of student outcomes
- Take away specific strategies for creating and using the Portrait of the Graduate to distinguish yourself in a highly competitive marketplace

Description:

A brief and evocative mission statement cannot express every aspect of your school's differentiating proposition. Learn how another set of statements—the Portrait of the Graduate—forms the foundation of your message framework AND the operational framework for measuring decisions made on behalf of students. Learn the power of leading this effort at your school: (1) how to prepare and support your team with a well-defined process; (2) how to engage your faculty, staff, and administration; and (3) how to use your Portrait of the Graduate to ensure that all employees are aligned with your school's unique approach to educational excellence.

Google and Facebook Data: Here's What You Need to Know

Led by: Greg Abel

Objectives:

- Learn today's recommended strategies for using Google Analytics and Facebook Insights
- Learn to apply your report interpretations to improve your marketing messages

Description:

The world of internet marketing has evolved over the last 20 years; in 2020, your school's website and online presence need to be continually cultivated. Attracting and retaining families requires attention to detail, and the use of a wide variety of platforms.

In this session, we examine how to use Google Analytics and Facebook Insights in your Marketing Office workflow. Learn why analytics reports are not "what you see is what you get"—what you get is what you interpret. We will review the basics of these platforms, and you will gain the confidence to dive right in!

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Virtual Advancement Summit Sessions

How to Create Your First Lead Magnet

Led by: Clint Losch

Objectives:

- Learn how adding just two key pages to any website can instantly improve your new family inquiries
- Learn the process for building a lead magnet funnel that increases the number of leads and families you're attracting to your school
- See seven lead magnet examples used by schools that are proven to generate new family inquiries
- Leave with the core elements of a lead magnet funnel that you can install on your existing website

Description:

Every minute you spend reading this, there is a parent visiting your website, then leaving, without you ever capturing their contact information. Odds are high you'll never hear from them again. Why? Because people today are inundated with marketing and content, creating a scarcity of attention. Just because someone reads a page on your website today does NOT mean they'll remember to revisit your site in the future.

To solve this problem, use a lead magnet—one of the most powerful tools to help generate leads for your admission funnel. In this session, we take you step-by-step through creating and launching your lead magnet funnel. Join us so that you can install it on your website in just a few days (instead of the months it usually takes for many schools).

How to Craft a Winning Social Media Strategy

Led by: Clint Losch

Objectives:

- Uncover the secret of how social media works to target your ideal families
- Learn how to maximize the reach of your organic social media content to reduce the need for paid advertising
- Explore the four core pillars of running a successful advertising campaign
- Get cut-and-paste campaign swipe files, blueprints, and process maps for easy implementation

Description:

Social media is the future of marketing and advertising as we know it—yet most school marketing departments are understaffed and don't have the necessary budgets to implement an effective social strategy.

As a result, many schools still engage in “traditional” marketing channels, such as placing ads in magazines, newspapers, TV, radio, and Google. Maybe you have also considered billboards, direct mail, and lawn signs. While these platforms still work, they are no longer as effective as they once were (and they still cost a lot of money).

In 2020, if you want to get the attention of mission-appropriate families in your market, refocusing the content you put on Facebook, Instagram, YouTube, Twitter, Snapchat (and whatever else has the market's attention at the time) is a huge factor.

In this session, we give you a proven, implementable social media strategy that any school can master, even if you have a small team.

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