

MISSION & MOTIVATION

Both Sides Now

When the business office and admissions team can see each other's point of view, a school is primed to thrive.



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In Mission & Motivation, an independent school leader shares a core belief and/or source of guidance or inspiration. Interested in contributing? Please email netassets@nboa.org. In the subject line, type **MISSION & MOTIVATION**.

Among the many aspects of school life that can bring the admissions office and business office together, perhaps the strongest is a shared need for and use of quality data, be it quantitative or qualitative. A colleague once pointed out to me — and I still agree with them now — that the business office often handles school decisions in terms of black-and-white policies and procedures tied to debits and credits, GAAP, or other regulatory standards, while the admissions office often encounters situations where more of a gray dynamic exists. Recognizing these different perspectives is essential to creating a high-functioning team where collaboration via open and honest communication occurs regularly.

I'm a head of school now, but much of my independent school career has involved enrollment management operations at independent schools. As an admission and financial aid director, I valued the same historical data that many business office leaders would cite, and used it to base projections, estimated yields and revenue allocations. However, the enrollment team also chased supplemental data that informed our approaches, whether that be survey data, notes from interviews with parents and even observational data. I actually had colleagues and parent ambassadors trained to contact me with rumors or even the occasional sighting of a current family at another school's open house event.

I've always loved numbers and had a natural proclivity to utilize data to inform and guide my thinking, which led me to earn an undergraduate degree in accounting and then serve on an audit team for a worldwide public assurance firm, KPMG, LLP. This experience, atypical for an admission professional, has greatly enhanced my ability to build bridges between academic and advancement operations and key business-related functions at schools. But you don't need particular credentials or specialized job titles to make these connections.

Even more important than understanding budgeting, financial statements, and financial and operational variables has been seeing the various stakeholder perspectives that go into constructing and interpreting the key markers of a school's stability. In my previous role at Trinity Episcopal School in New Orleans, for example, our advancement team, working from a quality database and with a commitment to strong data gathering and survey research, was able to build a systemic operation that allowed the admission, fundraising,

marketing/communications and business offices to work collaboratively towards shared goals with a clear purpose. We understood each other's strengths, challenges and expectations. Team members did not have a choice; no one could operate in a silo.

An annual retreat each summer set the tone for regular and oftentimes impromptu meetings throughout the school year. We would assist with each other's events and build a master calendar that focused on high impact touch points for various constituents. And our focus was to maximize each student and family's experience by creating a customer service culture where we regularly demonstrated that we knew and valued each family. Strong communication between departments helped us message our key internal marketing metrics of perceived value and return on investment to families, including where their tuition and donation dollars were going and how that translated into an invaluable independent school experience for their child(ren).

Ultimately we leveraged this shared approach to quantitative and qualitative data to transform some of our key advancement programs, including our annual fundraising program, which saw parent participation increase from 56% to 93% and dollars raised increase 75% over a three-year period. We also reduced voluntary attrition from 10% to 6%.

Admissions directors can build up their knowledge of the business office through a commitment to ongoing education (NBOA courses) and proactive communication. Don't wait until the financial aid season to discuss policies, procedures and projections. For its part, the business office should be aware of important milestones in the realm of school advancement. Advocate for a role in the admission and fundraising processes of the school — perhaps hosting a table at the school's open house or Zoom information sessions on financial aid.

The challenges the COVID-19 pandemic have brought upon our schools and larger communities are immense, but with an effort to understand each other's perspectives, a common language of data and shared belief in the school's mission and community, we will enhance the experiences that will inspire our families and students to enroll, reenroll, and give their time, talent and treasure now and into the future. **N**