

## Attention to Retention

*Whether enrollment has presented unexpected challenges or opportunities for your school this year, retention will be key to financial stability.*



**Jeffrey Shields, FASAE, CAE**

NBOA President and CEO

[jeff.shields@nboa.org](mailto:jeff.shields@nboa.org)

[@shieldsNBOA](#)

With tuition dollars reflecting 70–80% of a typical independent school’s annual revenue, the relationship between enrollment and a school’s long-term financial sustainability is undeniable. For this reason, in 2018, NBOA embarked on a partnership with the Enrollment Management Association (EMA). We began with a joint effort to tackle the provocative question, “Is financial aid dead?” Schools’ use of financial aid had long been shifting from its primary goal of diversifying the socio-economic background of its student body, i.e., “accessibility,” to an enrollment-oriented discounting strategy to address the rising cost of tuition for families, i.e., “affordability.”

The partnership has delivered shared programs and thought leadership to advance conversations critical to a school’s long-term financial future, which rest largely in the hands of these two senior roles. Our partnership has been further advanced by shared leadership at the board level of both associations. Heather Hoerle, EMA’s executive director and CEO, has ably served for several years as a valuable member of the NBOA Board of Directors. Recently, I had the distinct pleasure of joining EMA’s board of trustees and consider it a valuable opportunity to bring the business officer perspective to EMA’s strategic conversations.

And NBOA’s newest class of board members includes Laurel Baker Tew, assistant head of school for enrollment at Viewpoint School in Calabasas, California. A former EMA board member and officer

herself, Baker Tew is known as a thought leader in the field. We recently had a conversation that explored the vital relationship between the business officer and the enrollment manager as well as schools’ current market environment.

This 2020–21 school year, some independent schools have seen an influx of students who previously attended public schools. In some cases they are attracted by the five-day in-classroom programs that public schools could not provide, and in others they believe that independent schools can deliver online learning more effectively. Viewpoint, one of the largest K–12 independent schools in California, has experienced the latter firsthand. It’s also worth noting that Viewpoint has had steady enrollment for 15 years. Located on the far edge of Los Angeles County, it has long competed with small, richly resourced public school districts in its immediate surroundings and an adjoining county.

As Baker Tew describes it, “The calls came in all summer, with parents sharing that if their public school district was going to be entirely online, then they were going to go with an independent school that could offer their children direct and sustained daily interaction with their teachers.” Viewpoint School benefitted — 23 former public-school, full-pay families enrolled — while at the same time experiencing an uncharacteristic small dip in elementary retention. “Some of our continuing families with younger children decided to temporarily leave the area because of a variety of circumstances in California [health department restrictions and unprecedented wildfires]. They have left the state until things quiet down,” she said.

Baker Tew astutely recognizes that the enrollment manager’s attention — and that of all staff and faculty — should turn to retention of their new families. “Getting them is one thing, keeping them is another, especially when so many of the newest families enrolled without ever having seen the campus,” she said. The head of school, board of trustees and administrative leadership are

together focused on five pillars: “securing health and safety for the community using science-based guidance, promoting educational excellence, supporting employees, ensuring families can continue to afford tuition, and connecting our community.”

Retaining continuing families is equally important. Baker Tew understands that even with a clear plan and commitment to retention, “we are not entirely in control. Environmental factors, including guidance from local and state health departments, will continue to play an outsized role in our ability to retain families.”

In addition, Viewpoint has drawn on the strong partnership between the enrollment manager and the business officer, as well as the school’s strong sense of community and financial resourcefulness to establish COVID emergency funds. These are separate from the need-based annual financial aid budget, Baker Tew explained. “They are available to current families who typically were not receiving traditional financial aid but requested temporary financial support to keep their children enrolled,” she said.

The funds are available for families that can clearly demonstrate need because of the pandemic’s economic impact, not because they are simply uneasy about their financial circumstances. This key distinction signals that the community is willing to support families that have been economically impacted but makes clear that these additional resources cannot be sustained indefinitely. Families have responded favorably, and Viewpoint’s dedicated funds should be available through this year and next.

Baker Tew’s insights remind me of the many benefits to our schools when independent school leaders knock down silos, work collaboratively toward solutions, and with talent and determination, bring the best ideas forward to lead our independent schools during this difficult time. My hope is that these collaborations among senior staff leaders continue, and build, long after the current crisis subsides. 