

BIGGER BETTER





DATA, RESULTS,

BY SACHA LITMAN, MEASURING SUCCESS

Data can help independent schools attract better potential students, produce stronger educational outcomes and generate more alumni donations. Session preview from the 2015 NBOA Annual Meeting.

LEAD GENERATION

Independent schools used to fly blind when it came to finding prospective students. Admissions officers relied on neighboring “feeder” schools to provide the annual influx of new recruits. Few schools had the capacity to expand their reach to new geographic and demographic targets, even when traditional recruiting pools began to run dry. With enrollment on the decline and new families to potentially attract, how could any school know where to dedicate its energies?

Today, technology has evolved sufficiently to help schools identify which type of students are most likely to apply and matriculate. But admissions officers lack the time needed to cultivate relationships with the *thousands* of potential candidates.

So imagine this: What if admissions offices could utilize big data techniques to identify just the top 100 prospects for cultivation in any given year? Instead of having a single-digit chance of generating

an application from an admission fair or recruitment event, what if the percentage multiplied tenfold?

This approach is exactly what the Obama campaign and the Democratic National Committee (DNC) did to win the last two presidential elections. Little known outside the Washington beltway, Operation Narwhal is widely accepted by both Democratic and Republican strategists as the reason behind Obama’s victories in 2008 and 2012. The DNC combined a wide swath of data about voters in key swing states: past voter registration files, along with data that was publicly available, drawn from surveys, and based on web-based user interaction (remember invitations to join the Obamas for dinner?). These disparate sources helped identify voters’ key interest areas. Campaign strategists then cultivated relationships with those voters using targeted information to address their concerns. As we now know, the rest is history.

Welcome to the next phase of lead generation: Using big data to find the best voters, customers or, in the case of schools, students. Instead of waiting for families to inquire, lead generation allows schools to proactively engage the best potential candidates in their marketplaces. Already being explored by select universities, lead generation can help to both widen and winnow the independent school recruitment pool.

“Data improves our business intelligence and thus our operations,” says David Jacobs, assistant director of data analytics for Georgetown University’s McDonough School of Business. “The more we know, the better we can identify prospects, predict enrollment, track student outcomes and allocate resources.” In other words, the more data is leveraged, the better the outcomes.

But what does lead generation really look like for an independent, K–12 school? At Measuring Success, our experience with a number of schools suggests it can be very fruitful, especially when efforts expand beyond traditional market research.

“Independent schools are moving to significantly enhance and expand how they use data analysis and collection in their operations,” says Mitchel Malkus, head of school at Charles E. Smith Jewish Day School (CESJDS) in Washington, D.C. “We have significant goals to achieve in admission, retention and development, and our work in lead generation and alumni management will propel us to the next level of data use.”

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For CESJDS, lead generation includes performing data analysis on the school’s existing data and combining it with data from multiple other sources (community organizations, social networks and school-sponsored events) in order to provide a holistic picture of its target audience. As the school surveys constituents and performs social media outreach, it learns about the interests and traits of prospective families and directs them back to the CESJDS website. Through the sophisticated use of algorithms and predictive analytics, students are ranked by their likelihood to apply. The school then deploys its resources to target the most qualified students.

INDIVIDUALIZED LEARNING

Traditionally, many independent schools believed their value to be readily apparent to potential recruits. It was popular knowledge, for instance, that they were feeders to top colleges or attended by an elite network of families. They did not find relevant or necessary

the need to quantifiably demonstrate impact beyond top college attainment.

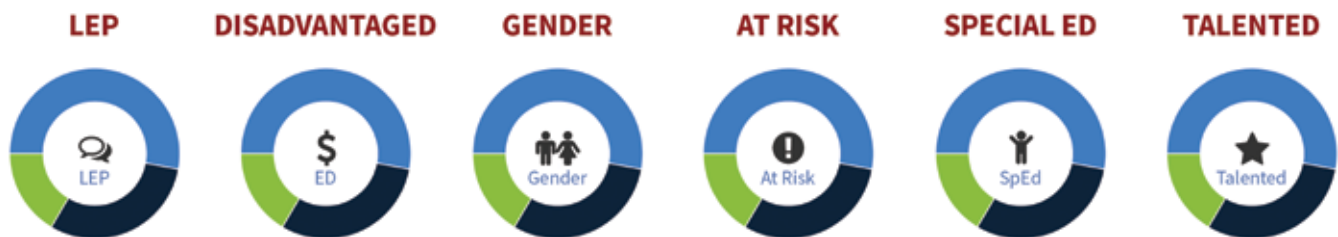
In recent years, market pressures have altered this perception. Society at large has developed an appetite for data, and parents, government and third-party groups have become keenly interested in schools’ abilities to deliver on educational goals. There are ever-increasing performance measurement expectations within the public education system in particular, due to the rise of charter schools, school choice and federal initiatives, starting with No Child Left Behind.

So far, it can be argued that this data explosion has had marginal impact on independent schools. Standardized test scores have had little bearing on school performance and operations at independent schools, where the matter of students performing below grade level is often not an issue.

More recently, however, there has been a new wave of big data to support individualized learning in the public and charter school worlds, and this one threatens to rock the independent school boat.

For evidence, look to foundations driving the national education agenda (e.g., the Bill & Melinda Gates Foundation, the Broad Foundation) and to government initiatives like Promise Neighborhoods. They are investing in “individual student journeys” made possible by technology and flipped classrooms. The idea is that instead of “teaching to the middle” (that is, the average student), with some students under-stimulated and others

Data-Tracking Prototype for Individualized Learning



Source: Measuring Success

overwhelmed by the pace, teachers should teach to each individual's strengths and weaknesses.

In essence, each child has his or her own learning pathway. It is the school's job to ensure that the student makes progress at the pace he or she is able.

For independent schools, this is a game-changer. A key reason most parents consider sending their kids to independent schools is individualized attention due to significantly smaller class size than found in public schools. However, to compete with results-focused public education models, independent schools are now recognizing the need to demonstrate their advantage in individualized learning as well.

Where does big data fit into this? As Peter Drucker, the famed management guru said, "If you can't measure it, you can't manage it." Public and private schools alike are employing tracking

systems to measure not only academics, but also social, emotional and neuro-developmental learning. By analyzing data patterns, systems alert schools as to which interventions are most likely to help any given student at any given time reach his or her full potential. For example, one student may need bullying support while another needs help with long division. The data systems provide the warning signals, and teachers follow up with individualized attention.

For the past year, we've been working with Southern Methodist University on individualized education journeys within West Dallas public schools. Our tracking system links together islands of data from schools along with data from community programs in which individual students participate, such as after-school programs, pre-school, summer school and social service agencies (all FERPA-compliant thanks

to release forms signed by each family; see data-tracking prototype, page 38.).

The combined datasets provide an eagle's eye view of a student's academic as well as social-emotional trajectory, helping educators and counselors perform more effective interventions. For example, if administrators are concerned about a certain student's truancy, they may learn from social services that his mother was just incarcerated, thus explaining the absences. By analyzing the database for other students with similar patterns, the school can make educated interventions, learning from past mistakes and successes.

Critics might say that this is what the smaller, more intimate environments of independent schools offer innately—individualized attention from faculty who are not just academic teachers but also guidance counselors and mentors. Increasingly, however, schools are realizing that the intent to provide



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- Improved communication and collaboration
- Implemented new systems

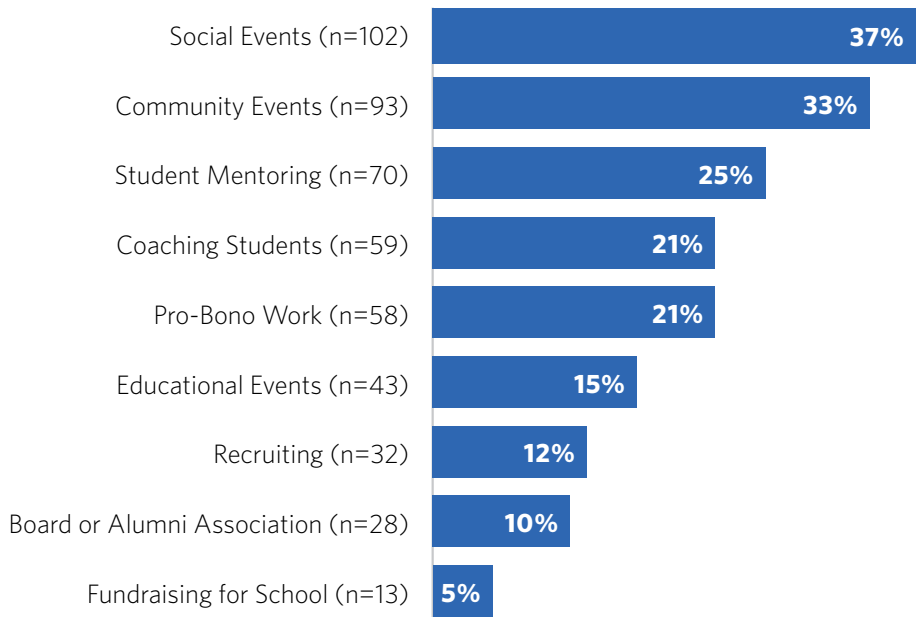
individualized attention does not always translate to reality. Without a system to track the data, independent schools struggle to manage holistic support processes—and to demonstrate results to parents and prospective families.

ALUMNI MANAGEMENT

The final area where data can play an increasing role is alumni relations. Before the digital age, graduating students would receive only the occasional alumni newsletter to maintain a connection. Alumni offices were reticent to personally cultivate alumni for donations until they were established in their careers and able to contribute significantly.

There is an obvious problem with this model. By the time an alumna hit 40, she might have competing loyalties to several alma maters as well as to other charitable organizations.

Interest in Alumni Opportunities



One school's alumni were asked if these alumni opportunities would be attractive to them. The bars represent the percentage responding 'yes.'

Source: Measuring Success



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Through its investment in data, UW advancement officials were able to identify 300 new planned-giving prospects and engaged 3,346 people dubbed “leaders” with giving potential of \$317,525,362. Tantamount to these efforts were the insights provided by the alumni data.

Granted, technology now allows schools to contact alumni frequently and much earlier on their life journeys, but few alumni offices take full advantage of the opportunities that our digital age provides. What if schools used big data and technology to ensure that each alumnus felt that his or her alma mater was a trusted partner along their journey? What would it look like for your school to contact alumni every week of their lives, starting with graduation?

The key to pulling this off requires flipping a paradigm: Instead of using technology (the ubiquitous e-newsletter) to tell alumni what is happening at your school, connect them with relevant opportunities to help them achieve their goals at each life stage. (How’s that for “value add”?)

This customer-centric model places alumni and their needs first, and it employs big data principles, such as combining research from alumni surveys, social media, purchased data and known information about graduates from their high school days. By tracking each alumnus’s details, you can assess his or her ongoing needs according to life stage, geography and interests. Leveraging your alumni network, you can then match graduates with those who can address graduates’ needs—for instance, support from a favorite high school math teacher for a student who is struggling in college, career connections for a recent graduate, or introductions to other local alums with similar interests to participate in curated programs.

Data and Fundraising

Finding ways to serve the individual needs of alumni also heightens their engagement. And as we know, engaged alumni tend to be more generous donors. Take The University of Waterloo (UW) in Ontario, Canada. In 2007, UW sought to double alumni giving from \$50 million to \$100 million. Jason Coolman, director of alumni affairs at the time, wrote about the initiative, “We are now strategists, and the goals we set must have measurable results that clearly benefit the institution.”

UW knew it needed to understand alumni to determine their likelihood for engagement. Through a survey that generated 10,000 alumni responses and a predictive model to represent non-respondents, UW identified 24 traits that led to alumni engagement, along with five traits that led to disengagement.

UW then ranked alumni by their propensity to give and assigned weights to the 24 predictive traits that led to increased giving. The top two for engagement were “executive job title” and “previous giving.” Alumni who met these criteria became the targets for UW solicitation efforts.

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We know that universities are more sophisticated and have larger budgets than independent K–12 schools. However, primary and secondary schools can easily invest in simple tools that will start them on their data-driven journeys. They can also look to their extant data stores, such as admission, tuition and coursework data to assess what activities and interest areas engage alumni most.

The benefits of data are manifold. As Jason Coolman told us, “Data is the most powerful tool we have to set our strategy, monitor our progress and ultimately determine success or failure. If you want to ensure your institutional leadership is aware of the success of the alumni relations function, you’ll need data to make the case.” ■



Sacha Litman is founder and managing director of *Measuring Success*, which consults to independent schools and other nonprofits on data collection, analysis and aggregation.

He previously worked for McKinsey and Company, Credit Suisse and an international nonprofit. He has a BS from Yale, an MBA from Northwestern and an MPA from Harvard.

Litman will deliver a presentation on this topic at the NBOA 2015 Annual Meeting, February 22–25 in Boston.

