**STANDARD**

# 13

An excellent Catholic school develops and implements a comprehensive strategy for institutional advancement based on a compelling mission through communications, marketing, enrollment management, and development.

**Benchmark 13.1:** The communications/marketing plan requires the school leader/leadership team and staff person(s) to ensure the implementation of contemporary strategies to reach targeted audiences, maintain communication outlets, serve all stakeholders, and provide data analysis.

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| **LEVEL 4**<br>Exceeds<br>Benchmark | The communications/marketing plan requires the school leader/leadership team and staff person(s) to ensure the implementation of contemporary strategies to reach targeted audiences, maintain communication outlets, serve all stakeholders, and provide data analysis. |
| | The school's communications/marketing plans **are up-to-date, comprehensive, and are integrated** into overall strategic planning activities. The latest technologies are being utilized successfully, and school leaders are engaged in scanning the environment to seek out new opportunities as they arise. |
| | Marketing efforts are assessed and evaluated in terms of their effectiveness and **accessibility** to all stakeholders as well as their cost-benefit and are enhanced or abandoned based on that analysis. |
| | Key data are stored in an integrated, secure manner that allows for low-cost, largely automated reporting on important success measures. |
| **LEVEL 3**<br>Fully Meets<br>Benchmark | The communications/marketing plan requires the school leader/leadership team and staff person(s) to ensure the implementation of contemporary strategies to reach targeted audiences, maintain communication outlets, serve all stakeholders, and provide data analysis. |
| | The school makes use of multiple information technologies to **reach targeted audiences and ensure accessibility.** |
| | The school establishes reliable and secure databases ensuring accountability to stakeholders. |
| **LEVEL 2**<br>Partially Meets<br>Benchmark | The school has a communications/marketing plan, but it is **not complete, regularly followed, or using contemporary communication strategies** to reach **all** stakeholders. |
| | For example, the school has a communications/marketing plan, that utilizes technology in a nascent or partial way, and/or key operational and educational data is tracked, but security is not assured and reporting on outcomes is difficult, inefficient, or done via an ad-hoc system. |
| | For example, communications/marketing is accessible to **some** stakeholders but not all. |

| Level 1 Does Not Meet Benchmark | The school **does not** have a communications/marketing plan, or the school does not use appropriate technologies to approach communications/marketing, or the school **does not use appropriate technologies** to secure critical data and enable process and outcome measurement for accountability purposes. |
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| | Accessibility is not a factor in communications/marketing. |

| Possible Sources of Evidence | • Communications/marketing plan |
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| | • Technology plan |
| | • Records of analysis of effectiveness of current and past marketing efforts (outcome measures) |
| | • Communication documents |
| | • Marketing documents |
| | • Databases with communications/marketing information |
| | • Evidence of communications/marketing in stakeholders' home languages |

**STANDARD**

# 13

An excellent Catholic school develops and implements a comprehensive strategy for institutional advancement based on a compelling mission through communications, marketing, enrollment management, and development.

**Benchmark 13.2:** The enrollment management plan requires the governing body to review and the school leader/leadership team to supervise annual and continuous measurement and analysis of recruitment, enrollment, and retention data for all student groups.

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**LEVEL 4**
Exceeds
Benchmark

The enrollment management plan requires the governing body to review and the school leader/leadership team to supervise annual and continuous measurement and analysis of recruitment, enrollment, and retention data for all student groups.

The measurement and analysis **actually takes place**, according to plan, and the information is used to direct decision-making related to tuition, marketing, communications, and other aspects of school operations that are linked to overall enrollment.

The enrollment management plan is an **integrated part** of the school's **comprehensive overall** operational planning. The governing body takes an active role in the measurement process and educates itself on best practices and techniques.

Data related to enrollment and retention patterns is **supplemented by external factor analysis** (demographic, economic, and competitive analysis). The measurement process dives deeper, seeking the root causes that underlie shifts in enrollment and explain retention numbers, and these underlying factors are used to drive decision-making.

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**LEVEL 3**
Fully Meets
Benchmark

The enrollment management plan requires the governing body to review and the school leader/leadership team to supervise annual and continuous measurement and analysis of recruitment, enrollment, and retention data for all student groups.

The measurement and analysis actually **take place**, according to plan, and the information is used to direct decision-making related to tuition, marketing, communications, and other aspects of school operations that are linked to overall enrollment.

**LEVEL 2**
Partially Meets
Benchmark

The school has an **informal** enrollment management plan, with some level of measurement and analysis executed on an **irregular or ad-hoc** basis. The information gained has some limited impact on other school operations.

**LEVEL 1**
Does Not Meet
Benchmark

The school **does not** have an enrollment management plan, or there is **no process** of regular measurement and analysis of student enrollment and retention patterns, or enrollment metrics are not used to inform decision-making.

Possible Sources
of Evidence

- Enrollment plan
- Documentation of enrollment management activities, including agendas and meeting minutes
- Measurement and analysis plans
- Current/recent analysis reports
- Collected enrollment and demographic data and recent analysis reports, for the whole school and by group within the school
- Interviews with staff to determine how (if) enrollment and demographic measures are driving decision-making regarding enrollment

# 13

An excellent Catholic school develops and implements a comprehensive strategy for institutional advancement based on a compelling mission through communications, marketing, enrollment management, and development.

**Benchmark 13.3:** The development/advancement plan requires the school leader/leadership team, in collaboration with the governing body, to ensure that key strategies and metrics are in place to identify, cultivate, analyze, and maintain significant funding sources.

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**LEVEL 4**
Exceeds
Benchmark

The development/advancement plan requires the school leader/leadership team, in collaboration with the governing body, to ensure that key strategies and metrics are in place to identify, cultivate, analyze, and maintain significant funding sources. School leaders **act on the plan.**

The development plan is **comprehensive and is well integrated** with all other operational plans. In addition to pursuing traditional strategies, school leaders engage in innovative approaches to identifying, securing, and growing new funding sources, and continuously scan the advancement/development industry to seek for new best practices to adopt locally.

External experts in the field of nonprofit or educational advancement and development are consulted and utilized effectively.

Advancement and development strategies are evaluated based on outcomes, and this information is tracked over time and used to modify, strengthen, or eliminate programs based on their actual effectiveness.

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**LEVEL 3**
Fully Meets
Benchmark

The development/advancement plan requires the school leader/leadership team, in collaboration with the governing body, to ensure that key strategies and metrics are in place to identify, cultivate, analyze, and maintain significant funding sources. School leaders act on the plan.

The plan includes forward-looking strategies to **expand the set or grow** the current funding sources and means of monitoring success.

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**LEVEL 2**
Partially Meets
Benchmark

There is a development/advancement plan but it relies on only a **limited**, **static** set of funding options without seeking to expand the set or grow the current funding sources.
OR
The school leader/leadership team in collaboration with the governing body **follows the plan in only a limited way OR follows the plan but doesn't monitor results.**

**LEVEL 1**
Does Not Meet
Benchmark

There is **no development/advancement plan** focused on forward-looking funding strategies.
 OR
The development/advancement plan is **not being followed.**

Possible Sources
of Evidence

- Development plan
- Prospect analysis
- School budgets (past, current, and projected)
- Advancement/development communication materials
- School leadership/governing body meeting minutes
- Results and yield based on development strategies implemented
- Alumni giving records, including percent participation