

Benchmark 13.1: The communications/marketing plan requires school leader/leadership team and staff person(s) to ensure the implementation of contemporary, multiple information technologies to reach targeted audiences, and to establish reliable and secure databases and accountability to stakeholders.

Level 4 – Exceeds Benchmark: The school’s communication and 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 as well as their cost-benefit and are enhanced or abandoned based on that analysis. Key data is stored in an integrated, secure manner that allows for low-cost, largely automated reporting on important success measures.

Level 3 – Fully Meets Benchmark: The communications/marketing plan requires the school leader/leadership team and staff person(s) to ensure the implementation of contemporary, multiple information technologies to reach targeted audiences and to establish reliable and secure databases and accountability to stakeholders.

Level 2 – Partially Meets Benchmark: The school has a marketing/communications plan, which 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.

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 marketing, or the school does not use appropriate technologies to secure critical data and enable process and outcome measurement for accountability purposes.

Self-study Team Level:

Visiting Team Level:

Possible Self-study

Evidence: Please mark every source of evidence that applies and provide a description for any additional source not listed in the boxes provided.

Note: Not all sources of evidence are expected to be present.

Visiting Team: Verify each source of evidence indicated by placing an “A” for artifact, “O” for observation, “S” for survey, or “I” for interview in the smaller box provided. In the larger box, list each source of evidence referenced.

<input type="checkbox"/>	Communication/marketing plan		
<input type="checkbox"/>	Technology plan		
<input type="checkbox"/>	Records of analysis of effectiveness of current and past marketing efforts (outcome measures)		
<input type="checkbox"/>	Communication documents		
<input type="checkbox"/>	Marketing documents		
<input type="checkbox"/>	Databases with marketing and communications information		
<input type="checkbox"/>	Other: <input type="text"/>		

Required Comments/Concerns/Conclusions:

Self Study:

Visiting Team:

✚ 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 both enrollment and retention patterns for all student groups. *(In Wisconsin, the governing body and school leader/leadership team annually review, analyze and utilize enrollment and retention data.)*

Level 4 – Exceeds Benchmark: 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 themselves 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.

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 both enrollment and retention patterns 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.)*

✚ 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.

Self-study Team Level:

Visiting Team Level:

Possible Self-study

Evidence: Please mark every source of evidence that applies and provide a description for any additional source not listed in the boxes provided.

Note: Not all sources of evidence are expected to be present.

Visiting Team: Verify each source of evidence indicated by placing an “A” for artifact, “O” for observation, “S” for survey, or “I” for interview in the smaller box provided. In the larger box, list each source of evidence referenced.

<input type="checkbox"/>	Enrollment plan		
<input type="checkbox"/>	Documentation of enrollment management activities, including agendas and meeting minutes		
<input type="checkbox"/>	Measurement and analysis plans		
<input type="checkbox"/>	Current/recent analysis reports		
<input type="checkbox"/>	Collected enrollment and demographic data and recent analysis reports, for the whole school and by group within school		
<input type="checkbox"/>	Interviews with staff to determine how (if) enrollment and demographic measures are driving decision making regarding enrollment		
<input type="checkbox"/>	<i>Admissions policies</i>		
<input type="checkbox"/>	<i>Exit surveys</i>		
<input type="checkbox"/>	<i>Parent satisfaction surveys</i>		
<input type="checkbox"/>	Other: <input style="width: 350px; height: 20px;" type="text"/>		

Required Comments/Concerns/Conclusions:

Self Study:

Visiting Team:

Benchmark 13.3: The development plan requires school leader/leadership team, in collaboration with the governing body, to ensure that key strategies are in place to identify, grow and maintain significant funding prospects, including alumni(ae), over time and when appropriate.

Level 4 – Exceeds Benchmark: 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.

Level 3 – Fully Meets Benchmark: The development plan requires school leader/leadership team, in collaboration with the governing body, to ensure that key strategies are in place to identify, grow and maintain significant funding prospects including alumni(ae), over time and when appropriate. School leaders act on the plan.

Level 2 – Partially Meets Benchmark: There is a development plan, and it has a limited or partial focus on funding strategies, or the development plan relies on only a limited, static set of funding options without seeking to expand the set or grow the current funding sources, or the development plan is well-written, but is followed in only a limited way.

Level 1 – Does Not Meet Benchmark: There is no development plan, or the development strategy does not focus on funding strategies, or the development strategy is not being followed in actual fact.

Self-study Team Level:

Visiting Team Level:

Possible Self-study

Evidence: Please mark every source of evidence that applies and provide a description for any additional source not listed in the boxes provided.

Note: Not all sources of evidence are expected to be present.

Visiting Team: Verify each source of evidence indicated by placing an “A” for artifact, “O” for observation, “S” for survey, or “I” for interview in the smaller box provided. In the larger box, list each source of evidence referenced.

<input type="checkbox"/>	Development plan		
<input type="checkbox"/>	Prospect analysis		
<input type="checkbox"/>	School budgets (past, current and projected)		
<input type="checkbox"/>	Advancement/development communication materials		
<input type="checkbox"/>	School leadership/governing body meeting minutes		
<input type="checkbox"/>	Results and yield based on development strategies implemented		
<input type="checkbox"/>	Alumni giving records, including percent participation		
<input type="checkbox"/>	<i>Review of the most recent development campaign</i>		
<input type="checkbox"/>	Development plan		
<input type="checkbox"/>	Other: <input type="text"/>		

Required Comments/Concerns/Conclusions:

Self Study:

Visiting Team: