Enrollment Management Workbook

Standard Implementation

## Introduction

One of the key components to a successful implementation is communication. This workbook is one of the most important tools your Blackbaud consultant uses to understand your school’s unique setup and needs, and how you plan to use the software. Knowing that schools often change their setup and process in order to better serve their community, please note that these will be used to configure your software. While you are not locked into the answers you give here, should the school choose to change these options after the consultant has configured the system based on your answers here, the school may incur additional costs and delays. Please make sure that you continually are communicating with your consultant about changes that are coming or are being discussed in order to avoid potential issues.

In addition to submitting this workbook, please send ALL items on the required materials checklist to your consultant.

## Your information

School name:

School location:

Name and title of person(s) completing this form:

## System Configuration

School Levels and Grade Levels

School levels set up the different school or grade level groupings within your system. This could be just a High School, it could be a K-12 that is broken up into Lower, Middle and Upper, or it could be multiple campuses. Please provide **all** school grade levels and how they are grouped together (i.e. High school – 9, 10, 11, 12, PG):

|  |  |
| --- | --- |
| School Level | Grade Levels associated |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### **What school programs do you offer? (If you have a 3, 4, or 5 day program, please specify for what grades these are applicable)**

|  |  |
| --- | --- |
| * ESL
 | * Learning Services
 |
| * Full-Day
 | * Half-Day
 |

* Other (please list)

# Admissions Process

How does your school receive inquiries?

|  |  |
| --- | --- |
| * Phone
 | * Walk-in
 |
| * Website
 | * Other (please list)
 |

How are applications going to be received?

|  |  |  |
| --- | --- | --- |
| * Online
* Paper
 | * Third party (i.e. SAO)
* Other (please list)
 |  |

What statuses can a candidate have throughout the admissions process (e.g. inquiry, applicant, application complete/ready for decision, decision)?

|  |  |
| --- | --- |
| * Inquiry
 | * Applicant
 |
| * File Complete
 | * Decision Made
 |
| * Other (please list)
 |  |

Please list below any items collected or completed during your admissions process as well as the school levels to which these steps apply. Please note, these can be both external (parent/student) and internal steps (staff specific).

|  |  |
| --- | --- |
| Steps in Admissions Process | School Levels to which this Step Applies |
| Example: ApplicationExample: Shadow Day | Example: All LevelsExample: Kindergarten-Grade 8 |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Would you be interested in using a form of Checklist in order to monitor any steps or paperwork for your re-enrolling students?

How do you conduct interviews (e.g. on campus, telephone, Skype)?

|  |  |
| --- | --- |
| * On Campus
 | * Telephone
 |
| * Virtual
 | * Off Campus
 |
| * Other (please list)
 |  |

What recommendation types do you request/collect?

|  |  |
| --- | --- |
| * Teacher
 | * Educational Consultant
 |
| * Other (please list)
 |  |

 Are you interested in building your teacher recommendations as fillable forms in the online system?

 What test scores do you request/collect?

|  |  |
| --- | --- |
| * ISEE
 | * PSAT
 |
| * TOEFL
 | * Other (please list)
 |

How do you classify candidates who have “dropped out” of the admissions process (e.g. enrollment withdrawn, DNCP -Did Not Complete Process)?

What reasons do you use for candidates who decide not to enroll/decline the admission offer (e.g. chose another school, did not receive enough financial aid)?

## Candidate Biographical Information

Please provide several examples of your “how did you hear” types.

Do you want to know candidates’ specific athletic, academic, and/or extracurricular interests individually (e.g. math, performing arts, soccer)? If yes, please provide several examples of your “interests”.

\* Please note that the system will break these down into Categories (Sports-Baseball, Extracurricular-Chess)

Do you want candidates to be able to choose from a list of feeder schools or simply type in their current school?

Please provide 3-5 feeder schools (these are schools that candidates attend before enrolling in your school).

Please answer Yes or No to indicate if you would like to collect and store the information listed.

|  |  |
| --- | --- |
|  |  |
| Religion |  |
| Ethnicity |  |
| Race |  |
| Citizenship |  |
| Gender |  |

## Communications

How do you primarily communicate with families (e.g. through the web, mail) for scheduling interviews, campus visits, parent meetings, etc.?

With whom do you primarily communicate (e.g. candidates, parents)?

# Contracts

What type of enrollment contracts do you use?

|  |  |
| --- | --- |
| * Day
 | * Boarding
 |
| * International
 | * Full Day
 |
| * Half Day
 | * Continuous Enrollment/Evergreen
 |

What Tuition Management System do use or plan to use?

|  |  |
| --- | --- |
| * Blackbaud Tuition Management
 | * Other (please list)
 |
| * FACTs
 |

What terminology do you use for admissions decisions (e.g. accepted, waitlisted, denied)?

## Financial Aid

What types of financial aid do you offer (e.g. need-based aid, merit, tuition remission, athletics scholarships)?

## REQUIRED MATERIALS CHECKLIST

* Inquiry form(s)
* Application form(s)
* Contract(s)
* Sample letter(s) or standard email template(s), e.g. Acceptance letters, denial letters, inquiry packets