

Measurement: The Key To Charter School Marketing

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A public school board member recently made the following statements to a local newspaper:

"We say we're going to market, market, market this school, but we don't do it," said the board vice president, expressing frustration that her district continues to lose students to other schools. *"We've talked about this for years, but we haven't done anything."*

Ever feel that way as board member of your charter school?

The solutions to the marketing challenge at your school might not be what you think—especially if you think that money alone is the answer. The school in the example above has an annual marketing budget of \$120,000 yet it is still losing students to other schools.

One reason is readily apparent: The board doesn't understand how to design and execute a marketing plan. Most revealingly, the article also stated, "district leaders said they don't have numbers on how many [XYZ] School students are leaving the district." If the board had an effective marketing plan they would know precisely how many students had left, why they left, and where they went. In a word, an effective marketing plan should have prescribed the constant measurement of these important data and the board and administrative team should have been evaluating the results to try to win them back and keep others from leaving in the first place.

Competition for students

Since most schools have the goal of being friendly, nurturing and collaborative, some people find the thought

of competing with a "sister school" disdainful.

If some on your board are prone to make this mistake, you can help them to understand the value of competition by pointing out that it brings out the best performance in people and helps keep the price of goods and services affordable.

Competition operates on the incentive principle. When two or more entities compete for the same customers or markets, they put forth their best efforts to win them. This incentive principle has worked throughout history and you can be sure it works in modern day American schools as well, regardless of whether some on your board fail to recognize it.

When boards fail to understand the necessity of strategically positioning the school to attract students, they will usually lose them. Complacently staking their hopes for a successful school on the "if you build it they will come" dream, the board at such a school will often witness a decline of enrollment numbers to the point where it is not possible to continue operations. Sometimes, by sheer luck, during times when the birth rate of school age children is on the rise or the community-at-large is growing, such a school may survive for a decade or two and even increase its enrollment, but without a master marketing plan it will not likely build permanent world class facilities of its own, project a shared vision for the future, or in the end, produce *sustainable excellence*.

If one or more people in the leadership of the school do not agree that your school needs to market itself to com-

pete for students, your first marketing challenge is to get them on board. Failing that, get them off the board. That may sound harsh, but the fact is, if you're in the school leadership business you have a duty and a fiduciary responsibility to the school to see to it that it flourishes.

If understanding the competitive nature of successful school viability already describes every board member and administrator on your team then you're ready to develop a specific marketing plan.

I will explain the most foundational marketing principle but a committed board will do a lot more reading than what space permits here. I recommend reading all kinds of books and articles that pertain to marketing, whether the commodity being written about is soft drinks or real estate or something else. Most marketing principles are easily adaptable to schools. Books on marketing small businesses are exceptionally useful because in many ways most schools operate much like small businesses.

Defining Marketing

Let us begin by defining exactly what marketing is, drawing on an idea from an all-time best-selling book on marketing for small businesses. In his classic book "Guerilla Marketing," Jay Conrad Levinson defines marketing as "everything you do to grow your business." In the realm of competing schools, this may be easily adapted to "everything you do to recruit and retain students."

What are some examples of "everything a school should do to recruit and

retain students?" It certainly includes advertising but it has to be a lot more! There have been many schools that have squandered operational dollars on advertising without achieving any results. The non-marketing professional may be surprised to learn there is much more to an effective marketing plan than conventional advertising spots on billboards, radio, TV or in the newspaper.

A Few Essentials

Though most people don't think of maintaining buildings and grounds as part of marketing essentials, they make a good starting point. Ask yourself what kind of impression is conveyed by the appearance of your school grounds when prospects arrive to visit. (For the purposes of this article, a prospect is defined as anyone inquiring about the possibility of enrolling a student in your school.)

Here are few basic guidelines for thinking about the appearance of school property:

- Is the grass neatly cut and trimmed on the school's property? Does everything have a fresh coat of paint, inside and out? Are there flowers? Are the sidewalks clean? Are the grounds free of litter?
- Is there adequate, friendly signage pointing the direction to the office for first time visitors?
- Is there ample visitor parking, clearly marked and close to the building?
- Are the trash cans clean and not overflowing with trash?

In addition to the grounds being clean and inviting, of course, prospects must feel welcome by the staff. Consider the following:

- How are visitors greeted when they call or arrive? (After years of leading schools, I am still astounded at the number of schools where the front office reception staff is aloof or telephone callers are greeted by a machine!)
- Have staff members been trained to properly receive visitors?

- Do teachers know what to do when visitors are escorted into their classrooms?

As simple as these things may seem, these are critical elements in your overall marketing plan. The reason is that you will spend a large part of your advertising budget *just trying to get prospective families to visit your school* so they can consider what you have to offer. Why spend all that money to get them there only to have them feel like they are less than your top priority when they pull into your parking lot or that the school is unattractive?

Once you have put your house in order, you are ready to go on to more intricate marketing considerations—but not beforehand. If your school hasn't yet addressed these points above, do not dismiss them.

Measurement: The Key

After you've created and implemented a written plan that encompasses the basics above, you are ready to move on to more complex marketing issues. The concept that follows is essential for the school that wishes to be successful in its marketing plan, so much so, that serious marketing professionals would never conceive of launching any kind of ad campaign without this step, but schools routinely fail to do it. What is this all-important step?

Measurement.

Measurement is the indispensable benchmark from which all marketing efforts proceed and are evaluated. Without measurement you are not marketing, regardless of how much advertising you may be doing.

Measurement is certainly not very glamorous (perhaps one of the reasons it is often overlooked). In fact, if done well, some parts of measurement, such as data collection and entry can be tedious. However, for the school that is serious about its marketing effort, measurement is the key to effectiveness.

I describe marketing measurement as a four-step process: Collection, analysis, creativity and evaluation.

Phase One – The Collection Phase

The first step in effective measurement is *accurate* data collection. What kind of data should you collect and how often should you collect it? Answer: Everything you can, as often as you can.

For ease of consideration let us break the previous statement into its two component parts. Collecting as much data as you can, should include all of the following at a *minimum*:

Family data

- Household income
- Number of other school age children residing in the enrolling student's household
- Ethnic origin/gender/age/grade
- Address (especially zip code)
- Parents' education, vocation, place of employment
- How far does each family drive to utilize your school?
- Do they have Internet access? Do they routinely check their email?

Communication data (data that identifies potential marketing communication "outlets")

- Radio stations that families and prospects listen to
- Local newspapers that families and prospects read
- Civic clubs to which families and prospects belong
- Private clubs to which families and prospects belong
- Churches which families and prospects attend
- Boards on which parents and prospects serve
- How often and which movie theatres are attended by families? What movies have they gone to see in the past few months?

Catchment area data (data that describes the area from which you draw students)

- Household income by zip codes
- Distribution of school age children by zip code
- Information about other schools

- within your catchment area
- Tuition rates for private schools drawing students from the same catchment area
- Advertising information produced by other schools
- General population trends and projections for your area
- Internal data about your school performance
- Enrollment patterns (by grade, gender, teacher, etc.)
- Every student's enrolling performance on standardized tests (benchmark)
- Every student's annual performance on standardized tests (gains)
- Classroom grades compared to standardized tests results
- Reenrollment rate by teacher/building/grade level
- Student performance data on standardized tests by classroom (and teacher)
- Honor roll statistics
- Other student awards
- Student achievements outside of school (e.g., music, scouting, martial arts, etc.)
- Student community service involvement
- Teacher awards for excellence (external sources)
- School awards for excellence (external sources)
- If you have alumni, what are they doing now?

The astute reader will have noted that in all the data above, *nothing was mentioned about creating clever advertising pieces*. Accurate data collection as the first step in measurement, however, has everything to do with precise targeting of specific advertising—*perhaps the most important part of successful advertising*.

Measuring as often as you can means that you have regular identified frequent junctions at which you are collecting data. As to when those junctions exist depends on what kind of data you are collecting. For example, your school should collect the following data *from every prospect who calls* (regardless of whether they end up enrolling):

- How the prospect heard about your school
- When they first heard about your school
- Current school which they are considering leaving and why they are considering your school
- Follow up information, especially residential zip code

And you should be collecting the following data from your existing families every year:

- Overall satisfaction survey covering *every* area of school operations
- Why they have chosen your school
- Media outlets they listen or subscribe to
- Whether they are planning to return next year

Then there is data collection based on student performance:

- At least once a year following standardized testing

And finally, one of the most important times to collect data—when families leave the school:

- Written exit survey with any family that leaves during the year specifically asking *why they are leaving*.
- Phone call survey to families that don't return the following year asking *why they didn't return*.

Phase Two – The Analysis Phase

As you begin collecting data, you proceed to the next phase of measurement, the analysis of that data.

There is nothing mysterious about analysis. It is merely the process of aggregating and disaggregating the data and studying it to identify patterns or trends. One way of studying the patterns and trends is to convert the data into chart or graph format. Sometimes patterns that are not otherwise easily observable can emerge as obvious when depicted graphically.

A good example of this exercise is to take a map that covers your catchment

area and stick pushpins in it marking where each family lives. Study the pattern that this creates and see if it reveals anything interesting about your school. It usually does.

The key to producing data that can be aggregated or disaggregated in ways that are useful for analysis is to record it using computer software. There are several software products—called contact managers—available off-the-shelf for a few hundred dollars that can be sufficiently configured to meet the needs of a school with up to a thousand students. If a school grows beyond that it can buy more expensive database software.

Phase Three – The Creativity Phase

This third phase is what most people think of when they think of marketing. Done apart from the measurement prescriptions above, however, the creativity phase is merely advertising instead of marketing. Anyone can advertise—some even get lucky. The goal of the discipline of marketing is to reduce the luck factor so that you can target the use of your limited resources effectively.

The creative phase can be described as the process of deciding what kind of advertising to do, how to do it, where to do it and when to do it. It should always occur in the context of the data that has been collected and analyzed for patterns and trends.

A few recommendations are in order concerning the creativity phase:

- Don't create cheap looking printed materials (e.g., business cards and stationery from your PC)
- Good graphic artists have creative capabilities and a knowledge of the print process that generally exceeds that of other people, so they are worth their fees
- Avoid doing too much creativity work as a committee
- Two-percent of your annual budget is not an unreasonable expense for advertising

- Doing Yellow Pages® advertising is generally a no-brainer for schools because of the number of people who turn to the phone book when looking for things. Unless you run a very expensive ad, it will usually pay for itself with one or two students per year.
- Avoid typos and mistakes at all costs. There's nothing quite so contradictory and self-defeating as the words "We Strive for Academic Excellence" in your school ad.

As you develop your marketing plan, it's a good idea in the creativity phase to lay out your advertising strategy for the entire year so that the look of pieces can be coordinated or "linked." Also, knowing what advertising you are going to do in advance gives you the advantage of time when negotiating with vendors.

Phase Four – The Evaluation Phase

Effective advertising has one criterion: Does it pull? In other words, did the specific ad or campaign achieve the intended outcome?

It really doesn't matter how much one or more board members like or dislike the artwork or colors in a particular ad. As the Latin phrase "De gustibus non est disputandum" says, "There is no disputing taste." It doesn't matter if the ad costs more money this year than it did last year. Everything costs more this year than it did last year. All that matters is, "Does it pull?"

As a board you cannot know whether an ad pulls unless someone is collecting and reporting the kind of data previously discussed in this article, hence the importance of the collection and analysis phases of measurement.

One cautionary note: Be very careful about conducting your evaluation with insufficient time for an ad to work. If you decide to run enrollment advertising on the radio, it probably will not generate a lot of inquiries after only one week. A more effective approach would be to run that kind of advertising on a regular basis throughout the course of a year and then evaluate the efficacy of the ad by the number of prospects who indicate that they heard about your school through your radio ads.

The Cost of Not Marketing

The K-12 schooling market is becoming increasingly competitive. Consider the following trends:

- In the past decade, the number of students being homeschooled has quadrupled.
- Charter schools are a relatively new innovation. As they prove their worth to the American public, there will be more of them for parents to choose from.
- Independent schools continue to be popular. The advance of tuition tax credits will help make them more affordable for many parents, thereby likely increasing their enrollment.
- As traditional public schools have continued to lose students to charter schools and other choices parents have, they have increased their own marketing efforts.

All of these variables mean at least one thing for your school: It is going to be harder to recruit and retain students in the future than it is today. Although producing excellence in your school is the most indispensable element in an effective marketing plan, it is not

enough. In this day and age, *you must tell people about it*. That requires a well-designed marketing plan in order to effectively use what are undoubtedly limited school resources. This requires the disciplines of reading, thinking, recording and analyzing data. The cost of not properly marketing may well result in the collapse of your school.

You Can Do This

Despite often-inequitable funding paradigms such as charter schools that receive no money from the state for buildings, etc., there are many charter schools succeeding across the United States. Your school can also be successful if you follow the principles outlined in this article.

There is no more worthy cause for effective marketing than the success of a school and ultimately, the success of your students.



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