



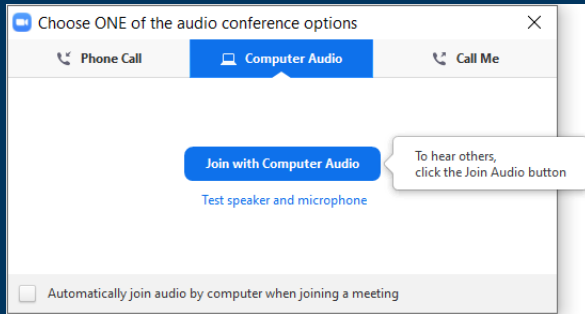
Financial Aid Optimization: A Q&A Session for Independent Schools with Higher Ed Experts

Independent School Executive Forum

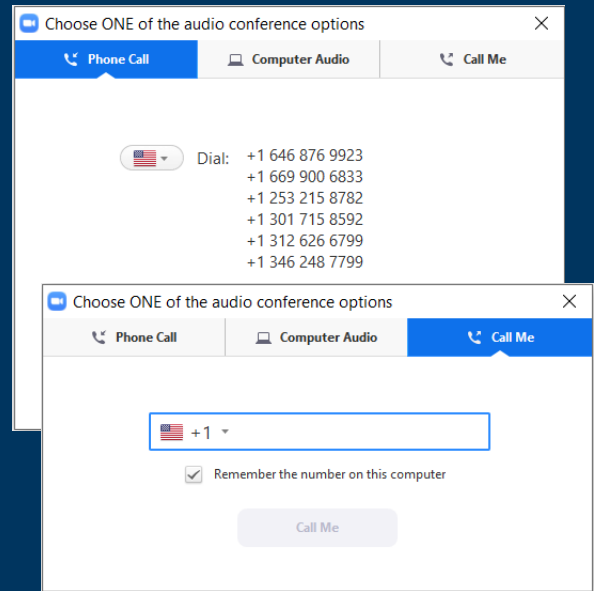
May 27, 2020

Audio Options in Zoom

1 Use your computer's audio and microphone through Zoom



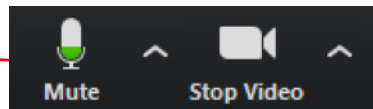
2 Dial in using your phone



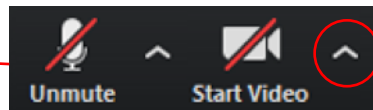
X Do not do both – it will cause feedback

Audio Mute/UnMute & Video Stop/Start

3



You are live.
Everyone can hear you.
Everyone can see you



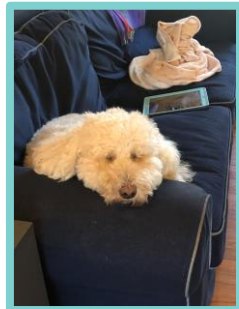
You are not live.
You are muted.
Your video is turned off.

Clicking the Up arrow next to the Mic and Camera icon at any time during the meeting will provide you with audio and video options.

A Few Helpful Hints

1. Always remember to mute your mic when you're not speaking. This reduces background noise and feedback.
2. Turn off non-essential software that may be using the internet while you are in a Zoom meeting.
3. Be aware of your location's bandwidth. Too many devices connected to your Wifi can slow Zoom. Consider disconnecting smart phones, tablets, etc. while in the Zoom meeting
4. If your internet connection becomes unstable, disable your webcam (stop video) and enable only when you need to speak.
5. No apologies necessary for the appearance of 'co-workers' or when life otherwise interrupts.

(My four-legged office-mate)



Access EAB Support Resources NOW

I left this as a placeholder from the Enrollment VRT

5

COVID-19 Resource Center



Read blog posts and expert insights on enrollment management in higher ed:

- [Survey results](#) on enrollment leaders' response to COVID-19
- [Strategies](#) for yielding next year's class
- [Enrollment marketing strategy](#) during the pandemic

Existing ISEF Resources



Review our study [Expanding the Enrollment Funnel](#) learn about reaching enrollment goals by expanding the top of the funnel:

- Leverage [word of mouth](#) to boost referrals
- Invest in [targeted digital marketing](#)
- [Update your website](#) to appeal to prospects

EAB Expert Insights



Expert Insights on Enrollment and Recruiting:

- [Targeted digital ads](#) promoting independent school's successful transition to distance learning
- Considerations for creating and distributing [Crisis Relief Funds](#)

About Financial Aid Optimization at EAB



EAB's Financial Aid Optimization (FAO) program features a team of experts that guide higher ed institutions with everything from financial aid policy development through yield management.

Three Areas of Focus:



Policy Strategy

Based on an analysis of a college's historical data, the FAO team identifies new market opportunities and helps to design an aid policy



Live Aid Modeling

The FAO team creates customizable aid models with live simulation capabilities that allow institutions to explore allocation options



Award Activity Monitoring

As an institution awards aid, live modeling enables progress monitoring and allows for changes in aid allocation

Joining Us Today: Brett Schraeder and Kathy Ruby



Brett Schraeder has over 20 years of on-campus experience with expertise in recruitment, data management, data analysis, financial aid at both strategic and operational levels, strategic planning, institution-wide budgeting, board management and governance, and marketing and communications.



Kathy Ruby works closely with clients at EAB to optimize their financial aid awarding and operational policies to meet institutional enrollment and revenue objectives. Her successful career as a financial aid administrator and enrollment manager spanned almost three decades and several different types of institutions, including independent schools.

EAB's COVID-19 Resource Center

Should we
keep this?

8

Support your school through the coronavirus crisis

1. Bookmark these pages for the latest official information about the coronavirus

2. Use EAB research and resources to support your school's response to coronavirus

3. Reference peer policies and other guidance when developing response plans

4. Use these peer examples to help communicate coronavirus information

5. Read the coronavirus responses from the major education associations

6. Find Department of Education resources by state

2. Use EAB research and resources to support your school's response to coronavirus

Most of these resources were not created specifically for infectious disease outbreak responses. That said, many of our existing resources can complement, supplement, and inform a variety of crisis response, planning, and mitigation efforts. Explore the three topic areas below.

NEW Support student success during instructional disruption

Provide transparent and timely communication

Websites

Independent Schools

School Districts

- NEW Castilleja School
- Lakeside School
- NEW National Cathedral School
- NEW The College Preparatory School
- The Episcopal Academy
- Cypress Fairbanks Independent School District
- NEW Halton School District Board
- NEW Paulding County School District
- Renton School District
- San Jose Unified School District
- West Windsor-Plainsboro Regional School District

Direct Communication

Independent Schools

School Districts

Regional and global information hubs, relevant EAB research and resources, responses from major education associations help partners stay up to date and make informed decisions.

District specific examples of comprehensive websites, direct communication, and social media messaging help partners navigate varied communication needs.



To Learn More:

eab.com/K12covid19response

Upcoming Virtual Roundtables

Mark Your Calendars for These ISEF Working Sessions



CFO Peer Circles

One-hour monthly sessions for cohorts of ~30 schools of similar size to inform key learning decisions and share advice with peers



First week of June, July, August (dates varies by cohort¹)



Enrollment Leader Virtual Roundtables

Monthly virtual meetings to discuss retention and recruitment efforts during the pandemic



June 10, 1:00 pm ET | July 16, 1:00 pm ET | August 11, 11:00 am ET



Advancement Leaders Virtual Roundtables

Executive Overview of the CARES Act and Strategies for Creatively Focusing on Critical Instructional and Health Priorities



June 18, 1:00 pm ET | July 22, 1:00 pm ET | August 18, 1:00 pm ET

¹) Notification of cohorts, dates/times provided