



EAB

Projecting Enrollments at Your School with Employment Data

A step-by-step guide to enrollment planning
using employment data

Independent School Executive Forum

Overview: Enrollment Planning with Employment Data

A Step-by-Step Guide

Challenges from the COVID-19 crisis and subsequent economic turmoil have threatened enrollment and retention at independent schools across the country. Schools everywhere face uncertainty about whether families will re-enroll amid increasing financial strain and historic unemployment rates. To be able to conduct scenario planning amid this uncertainty, independent schools should use employment data to more accurately project enrollment trends in the months ahead.

Step 1: Collect Employment Data for Current Families



Where do our current families work?

To begin, collect employment data from all currently enrolled families at your school. For some schools, this data already lives in your student information system. For others, this first step will require a heavier initial lift.

Step 2: Determine Low, Medium, and High-Risk Industries



Which industries are at greatest risk of being affected by the COVID recession?

You will need to consider both regional and national employment trends to determine which industries are low, medium, and high-risk for being impacted by the recession in your area. The risk to jobs by industry will vary based on geographic location, as COVID has affected regions in different ways.

Step 3: Project Enrollment Scenarios Based on Employment Data



How could different employment scenarios impact enrollment and financial aid?

Next, overlay family employment data with the applicable employment industry trends to play out different scenarios. These projections can be used to predict best-, medium-, and worst-case scenarios for enrollment and financial aid in the coming years.

Step 4: Tailor Follow-Up to Improve Retention



How can we use this information to guide next steps?

An additional benefit to this modeling is the opportunity to tailor your outreach to families based on their employment risk and related level of need. The insight derived from this work can also be used to drive retention, advancement, and recruitment efforts.

Collect Employment Data for Current Families

Begin the Process by Compiling a Comprehensive List of Families' Employers

1 Determine what employment data exists in your student information system



Run an employer screen over your student information system to pull data, including type of occupation and where each parent works. **If this information has not been collected, skip to the next step.**

Considerations:

- Parent employment information may be incomplete (e.g. just for one parent) or outdated; be sure to double-check existing records to ensure they are up-to-date
- **If you have not compiled any parent information, move to the next step**

2 Identify what gaps are left to fill



Create a list of families with outstanding employment information, which could include all families if you have never collected this information. Redeploy underutilized staff to search LinkedIn and other online resources to fill in the gaps for families where information is not already in the system.

Considerations:

- Professional information is often available through online on networking sites like LinkedIn, in addition to parents who list professional information on their social media pages
- If you are unable to find this information online, check to see whether your school's parent ambassadors can help fill in the gaps for you

3 Finalize the list of all current families and their employers



Compile a final list of all families' employment data. Save this list to use for the next step in the process to categorize employment risks and project enrollment scenarios.

Considerations:

- Once the list is finalized, maintain up-to-date records in your student information system so that this data is easily accessible
- Consider asking parents to provide you with this information each year or have a staff member refresh the list on an annual basis

Determine Low, Medium, and High-Risk Industries

Identify Region-Specific Risks to Industries Using Employment Data

Examine National and Regional Employment Data

National Industry Trends

All schools should consider which industries will be universally impacted when determining low, medium, and high-risk industries during the COVID-19 recession. Use publicly available data sources to identify general industry employment trends.



Example:

47%

of leisure/hospitality industry impacted, with a loss of 7.7 million from jobs¹, from March-April 2020

Publicly available resources for national employment data

- U.S. Bureau of Labor Statistics – [Employment Situation Summary](#)
- ADP Research Institute – [National Employment Report](#)

Regional Industry Trends

In addition to national trends, examine which industries in your area may be directly or disproportionately impacted. It is important to also note industries that either were not affected or may have experienced a positive impact from the pandemic (e.g. tech).



Example:

88K

estimated jobs lost in New York City's arts and entertainment industry as of April 2020²

Publicly available resources for regional employment data

- U.S. Bureau of Labor Statistics – [Local Area Unemployment](#)
- Brookings – [Visualizing Vulnerable Jobs Across America](#)

Designate Low, Medium, and High-Risk Industries Based on Data

Level	Description
 High	Industries that are likely to have been immediately impacted by the economic downturn and/or likely to see sustained impact as a result of COVID-19.
 Medium	Industries that may have been impacted by the economic downturn in the short-term but are likely to recover soon .
 Low	Industries that have not been impacted by the economic downturn and may have even benefitted from changing needs and demands.

1) U.S. Bureau of Labor Statistics Employment Situation Summary, May 8, 2020

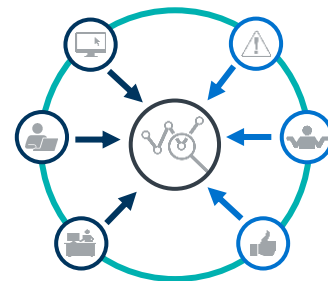
2) [The New Strain of Inequality: The Economic Impact of Covid-19 in New York City](#), Parrott and Moe.

Project Enrollment Scenarios

Overlay Designated Industries by Risk with Current Family Employment Data

At this point, you should have both a comprehensive list of family employers and a categorized risk list of industries based on your school's specific geographic location. To project potential enrollment scenarios, overlay the list of industries with your current family employment data to determine how many of your currently-enrolled families work in high, medium, and low-risk industries.

Note that some families have parents' who jobs put them into different risk categories (e.g. one high-risk parent, one low-risk parent); use your best estimate to place these families in a category, while noting that follow-up outreach may be needed to clarify where they should be grouped.



Categorize Families as Working in Low, Middle, and High-Risk Industries

Fill in the following chart based on the results of the above overlay exercise. Use the *number* of families per category to gauge the necessary lift for immediate next steps (see "tailored follow-up" for additional details). Use the *percentage* of students based on total enrollment to project potential enrollment scenarios for the upcoming school year.

	Low Risk	Medium Risk	High Risk
Number of Families			
Number of Students			
Percentage of Students Based on Total Enrollment			

Play out Best, Middle and Worst-Case Scenarios

Use the calculations above to play out different scenarios of families being affected by the COVID recession and project how much additional financial aid you would need to retain these families. In particular, consider the revenue loss of families with multiple children in the school, especially with students in lower grades who may require aid for longer.

One way to help move your school into a better enrollment position is to identify ways to reduce the risk of losing families. The next section provides advice on how to follow up with families in each risk category.

Tailored Follow-Up

Use Risk Categories to Customize Outreach and Support

Once you have determined a list of low, medium, and high-risk families by industry, use the guidance below to appropriately tailor your outreach and follow-up. Your understanding of families' current and projected financial situations should guide your decisions regarding aid, advancement, and retention efforts.

Families Employed in High-Risk Industries



Conduct Proactive Outreach

Reach out to all families on the high-risk list.

Personal outreach demonstrates your school's level of care for each individual family's situation. This first touch will help to determine what additional support the family might need, as well as gauge potential hesitation about future enrollment. It can also help you to determine whether the family is listed in the appropriate risk category or should be moved elsewhere. [Review this resource](#) to learn more about how to plan family outreach.



Offer Immediate Assistance

Use bridge loans or emergency financial aid to relieve immediate burden.

Families in the high-risk list should be top contenders for immediate financial assistance. Retaining these families now means less strain on your enrollment down the line. Some families may not realize there is emergency financial aid available – or think that they do not qualify – so be sure to proactively explain available avenues for financial relief. For key considerations in creating a crisis relief fund, we recommend [this EAB resource](#).

Families Employed in Medium-Risk Industries



Determine Individual Family Circumstances

Conduct personal outreach to learn more about the state of each family.

While medium-risk families should be prioritized below high-risk families, individual outreach is still an important first step. This connection shows that you are aware of and invested in their potentially changing situation and will help you further determine which families may be at risk. From there, adjust follow-up towards high or low risk actions accordingly.

Families Employed in Low-Risk Industries



Prioritize Low-Risk Families in Fundraising Efforts

Highlight low-risk families as prospects for your advancement office.

Advancement offices should prioritize low-risk families for immediate and upcoming fundraising efforts. This is particularly true for raising money for crisis funds, as these families will have more financial bandwidth and are more likely to be looking to help those in the community who have been affected.



Focus New Recruitment Efforts on Families in Low-Risk Industries

Use marketing initiatives to target families employed in low-risk industries.

Prioritize families that are not suffering the financial effects of the pandemic—or who are employed in industries that are thriving—in current and upcoming recruitment efforts. Families employed in these industries are more likely to have the sustained financial means to enroll in your school and may be increasingly interested given the current constraints of online education in many public school districts. This recruitment can help offset attrition due to COVID-19.

Source: EAB interviews and analysis.



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