



AISAP
ANNUAL INSTITUTE
LA JOLLA, CA 2023
JUNE 25-28

Welcome	3
Institute Highlights	4
Registration and Pricing	5
Hotel and Travel Information	8
Area Map.....	9
Schedule.....	10
Cohort Groups	12
Cohort Group Schedule	13
Cohort Group Leaders	14
Program Volunteers.....	16
Special Events	17
Leadership Labs	18
Cornerstone Sessions.....	20
Learning Tracks.....	22
Standards & Skills Sessions	24
Sponsors.....	52
General Information	57
Upcoming Learning Opportunities	58

**“Alone, we can do so little; together, we can do so much”
– Helen Keller**

On behalf of the entire AISAP team and Board of Directors, I welcome you to the AISAP Annual Institute—the only gathering focused solely on you, an Admission and Enrollment Professional. The structure of this in-person event will enable you to learn strategies and concepts and then put them into action by putting your plans together. Whether entering, emerging, advancing, or a master in the profession, you’ll find sessions to help you continue to grow in your career.

Please reinforce your commitment to this profession and gain new knowledge from the education sessions and your cohort groups. I also hope you feel strength in the numbers of your peers and are empowered to elevate the practice of enrollment management.

On a personal note, I am grateful to each of you for making this experience another moment for our profession to be proud. As the quote above states, we can do so much together, and as we reflect on the impact our work can and should have on our school communities and the larger world. Going it together and belonging to a community of colleagues who as well are working towards advancing the profession as the foundation of institutional success and creating the conditions for each practitioner’s continuous growth and development is not only more impactful when we work together, but it is also more enjoyable.

So, know you belong. You are here because of those who preceded you, you belong as you are amongst some of the best in the profession, and you belong as you are shaping the future.



Janice Crampton

Janice Crampton, CAEP, AEMP
Executive Director and CEO
Association of Independent School Admission
Professionals (AISAP)

WHY ATTEND?

- Experience over 70 sessions on strategic admission and enrollment topics
- Connect in cohort groups that will emphasize the importance of contacts, collegiality, and community of peers
- Access professional curriculum all aligned with AISAP's Learning & Development Framework.
- Become better stewards of your school's resources
- Network with organizations and colleagues from around the world

WHO SHOULD ATTEND?

- Admission and Enrollment Professionals (all levels)
- Marketing and Communications Professionals
- Financial Aid Professionals
- Those who support admission and enrollment at their institution

DON'T MISS:

- Hands-on learning experiences
- Daily networking opportunities
- Learn more about industry solutions from our sponsors and exhibitors

"Great ideas seldom happen in isolation, and the best brainstorms are collective!"

– Amy Gay, CAEP
Director of Admission
Episcopal School of Jacksonville

REGISTER TODAY!

<https://2023-annual-institute.events.aisap.org/registration/register>

- \$1,595 US each for Individual AISAP Members
- \$2,495 US each for Individual Non-Member
- \$1,195 US each for Multiple Registrations (must have 2 or more people register together)
- \$995 US each for Sahadi Scholarship

Your Annual Institute Registration includes:

- Transportation to and from the host hotel and school, Tuesday evening reception, and dinner
- Printed coursework materials
- Sunday – Heavy appetizers and drink ticket
- Monday – Lunch, snacks, and reception food and beverage
- Tuesday – Lunch, snacks, and Tuesday evening food and a drink ticket
- Wednesday – Morning buffet breakfast

Teams receive discounted pricing. Register your entire team with one invoice. Simply click the register button and select the type of registration. If team members are unknown, you can enter TBD. Contact the AISAP office for assistance at (203) 421-7051 or info@aisap.org.

REGISTRATION & PRICING

ONSITE REGISTRATION & HELP DESK REGENCY BALLROOM FOYER, HYATT HOTEL

Sunday, June 25 | 12:00 PM – 7:00 PM

Monday, June 26 | 8:00 AM

Tuesday, June 27 | 8:00 AM

Wednesday, June 28 | 8:00 AM

IMPORTANT REGISTRATION REMINDERS

- Be sure to use the email address of the attendee as the primary contact
- If you are registering for someone else, you can add your email as a CC
- AISAP membership status must be current and in good standing during the Annual Institute
- Contact AISAP at billing@aisap.org if you are unsure of your membership status
- You may register multiple people from your office at the same time
- Registration fees do NOT include any travel expenses
- Keep your registration confirmation email for your records and modifying your registration
- Your registration will need to be paid in full prior to arriving to the event
- All payments must be made by June 24, 2023. For more information please contact billing@aisap.org.

REGISTRATION & PRICING

CANCELLATION & SUBSTITUTION POLICY

We understand unforeseen medical or personal emergencies may create a need for a cancellation. All cancellations must be submitted in writing to billing@aisap.org. Administrative fees and refund eligibility are as follows:

	Cancellation Received in Days Prior to Program Start Date		
	> 90 days cancellation notice	90 - 30 days cancellation notice	< 30 days cancellation notice
Annual Institute	\$200.00 Fee	\$500.00 Fee	No Refund

HOTEL & TRAVEL INFORMATION

EVENT VENUE

La Jolla Country Day School
9490 Genesee Ave
La Jolla, CA 92037

HOTEL RESERVATION

Hyatt Regency La Jolla at Aventine
3777 La Jolla Village Drive
San Diego, California 92122
877-803-7534

<https://www.hyatt.com/en-US/group-booking/JOLLA/G-ASIS>

HOTEL & TRAVEL INFORMATION

VISITING SAN DIEGO

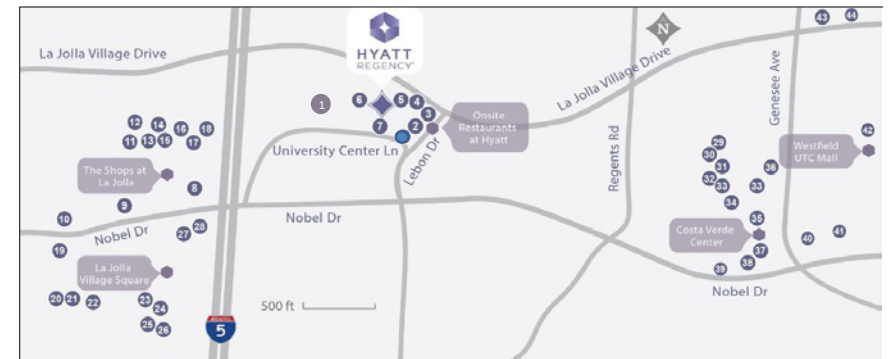
Your safety is our top priority. We will follow the safety and health protocols as outlined by San Diego County, California and the Hyatt Regency Hotel. As we get closer to the Institute, we will continue to enhance policies and procedures that might impact a variety of our conference aspects including food service, room spacing, and other indoor event precautions.

We recommend booking your airfare at least 14 days in advance in order to find the best rates and availability.

Plan for the possibility of wearing a mask while in the hotel and/or meeting space.

AREA MAP

Hyatt Regency La Jolla Local Dining Recommendations



Hyatt Regency La Jolla
3777 La Jolla Village Dr.
San Diego, CA 92122
Tel: (858) 552-1234
lajolla.regency.hyatt.com

Getting Around
The Shops at La Jolla: 8-10 Minute Walk
La Jolla Village Square: 12 Minute Walk
Costa Verde Center: 15-20 Minute Walk

Local Attractions
Birch Aquarium: 2 Miles
Beaches: 2.5 Miles Downtown
La Jolla: 4 Miles
Torrey Pines State Park: 3 Miles

LEGOLAND California: 22 Miles
San Diego Zoo: 14 Miles
SeaWorld San Diego: 11 Miles
Balboa Park: 14 Miles

1 Food Truck (THURSDAYS)	11 Flame Broiler	21 Chipotle Mexican Grill	31 Starbucks	41 Eureka!
2 Flemings	12 Snooze A.M. Eatery	22 Starbucks	32 Shake Shack	42 UTC Mall Food Court
3 Closed - TBD	13 Rubio's	23 Jamba Juice	33 Chipotle Mexican Grill	43 Red O
4 Trulucks	14 Nekter Juice Bar	24 Tap Room - zPizza	34 Subway	44 P.F. Chang's
5 Drift	15 Sprinkles Cupcakes	25 Ralph's Grocer	35 Closed - TBD	
6 Closed - TBD	16 Philz Coffee	26 Poke One N Half	36 Great Maple	
7 Hyatt Market	17 The Melt	27 Padadak Korean Chicken	37 Closed - TBD	
8 Whole Foods	18 Kinoyume Sushi	28 California Pizza Kitchen	38 Bristol Farms	
9 Mendocino Farms	19 Urban Plates	29 Closed - TBD	39 McDonald's	
10 BJ's Restaurant	20 Trader Joes	30 Robeks Smoothies	40 Closed - TBD	

SCHEDULE

SATURDAY, JUNE 24

AISAP Board of Directors Meeting

SUNDAY, JUNE 25

12:00 PM

1:30 PM – 2:30 PM

Hyatt Regency

Registration Opens

Welcome and Opening Remarks

Message from Incoming President of AISAP

Values and Vision Award

Cornerstone Speaker

Cohort Experience and Welcome

Welcome Reception Hosted by AISAP Board of Directors

2:30 PM – 4:00 PM

4:15 PM – 5:30 PM

5:30 PM – 7:00 PM

MONDAY, JUNE 26

8:15 AM – 8:45 AM

9:00 AM – 9:15 AM

9:15 AM – 10:00 AM

10:00 AM

10:30 AM – 11:20 AM

11:20 – 11:30 AM

11:30 AM – 12:20 PM

12:30 PM – 1:15 PM

1:30 PM – 2:20 PM

2:20 PM – 2:30 PM

2:30 PM – 4:00 PM

4:00 PM – 4:15 PM

4:30 PM – 5:30 PM

5:30 PM – 7:00 PM

La Jolla Country Day School

Transportation Available to La Jolla Country Day School

Welcome and Work of the Day

Cornerstone Speaker

Break

Standards & Skills Sessions 1

Break

Standards & Skills Sessions 2

Lunch

Standards & Skills Sessions 3

Break

Standards & Skills Sessions 4

Transportation to the Hyatt

Cohorts and Cabanas

Reception (hosted by AISAP Team)

TUESDAY, JUNE 27

8:15 AM – 8:45 AM

9:00 AM – 9:50 AM

9:50 AM – 10:00 AM

10:00 AM – 10:50 AM

10:50 AM – 11:00 AM

11:00 AM – 12:15 PM

12:15 PM – 1:00 PM

1:15 PM – 2:15 PM

2:15 PM – 2:30 PM

2:30 PM – 4:00 PM

4:00 PM – 4:30 PM

4:30 PM – 5:30 PM

5:30 PM

6:00 PM – 8:30 PM

WEDNESDAY, JUNE 28

8:30 AM – 9:45 AM

10:00 AM – 11:30 PM

11:30 PM – 11:45 PM

La Jolla Country Day School

Transportation Available to La Jolla Country Day School

Standards & Skills Sessions 1

Break

Standards & Skills Sessions 2

Break

Standards & Skills Sessions 3

Lunch

Cornerstone Speaker

Break

Standards & Skills Sessions 4

Transportation to the Hyatt

Free Time

Transportation to the Birch Aquarium for Evening Event

Reception and Lite Bites (Hosted by San Diego Area Admission & Enrollment Professionals)

Hyatt Regency

Breakfast Buffet with AISAP programs and services update

Cornerstone Speaker and Activity

Closing Remarks

COHORT GROUPS

Since AISAP's founding, participants have been in small groups to connect people at similar stages in their profession or as like schools or interests. This connection has stood out as a value and hallmark for the event and a demonstration of our value and regard for belonging.

AISAP Cohort Groups have commented on how valuable these connections have been throughout the Institute and the year. For some, the Cohort experience has been transformational.

So, what can you expect from your Cohort Group at the Annual Institute?

- You will be matched with others interested in similar aspects of their work, journey, or hopes for their future in the profession.
- You will receive correspondence before the Institute from your Cohort Leader welcoming you, introducing you to others in your group and answering questions about the program that awaits you in La Jolla.
- You will be greeted and seated with your Cohort Group during our Opening Welcome and Sunday afternoon "Belonging" sessions.
- You will participate in team-building exercises that will set the stage for the week ahead and help put you into the mindset of belonging.
- You will meet within your group multiple times over the three days we are gathering.
- You can expect to meet quarterly through Zoom with all Annual Institute participants in their Cohort Groups, focusing on timely topics and "catch up."

COHORT GROUP SCHEDULE

SUNDAY, JUNE 25

4:15 PM – 5:30 PM Cohort Welcome and Activity

MONDAY, JUNE 26

4:30 PM – 5:30 PM Cohorts and Cabanas Poolside Gathering at the Hyatt

WEDNESDAY, JUNE 28

8:30 AM – 9:45 AM Breakfast with Cohorts

Your cohort leader will be in touch regarding additional opportunities to meet with your group on Monday and Tuesday.

COHORT GROUP LEADERS



Kim Bair
Washington Episcopal School



Glynn Below
Randolph School



Jenni Biehn
Western Reserve Academy



Patty Bloom
Saul Mirowitz Jewish Community School



Angela Brown
Dana Hall School



Angela Castano
Westminster Christian School



Scott Collins, Ed.D.
University School of Nashville



Sylvester Cutler
Greenhills School



Jorge Delgado
Buckingham, Browne and Nichols School



Bill Diskin
Cannon School



James Eberhart
Chadwick School



Kelly Emerson
Randolph School



Susan Emery
Kingswood Oxford School

COHORT GROUP LEADERS



Davion Fleming
Lick-Wilmerding High School



Homa Hanjani
San Francisco Day School



Tammy Honeggar
Tampa Preparatory School



Susan Mantilla-Goin
Pomfret School



Kristen Mariotti
Emma Willard



Lisa Moreira
Horace Mann School



Ingrid Palmisano
Miami Country Day School



Chase Spong
Woodbury Forest School



Christina Townsend-Hartz
University School



Julia True
International School of Amsterdam



Sindy Udell
Milton Gottesman Jewish Day School



John Wuorinen
Columbus Academy

AISAP wishes to thank our volunteers who have assisted in the aspects of this year's Annual Institute.

Host

Geordie Mitchell, La Jolla Country Day School

Founders Dinner Host

The Bishop's School, Vivien Mallick

AISAP Annual Institute Standards and Skills Content Review Committee

Chair, Debby Murphy	AISAP
Angela Brown	Dana Hall School
Janice Crampton	AISAP
Davion Fleming	Lick Wilmerding School
Allison LeTourneau	Berkshire School
Geordie Mitchell	La Jolla Country Day School
Scott Schamberger	Indian Springs School
Steve Salvo	St. Mary's Episcopal School

Cohort Activity Planning

Tammy Honegger	Tampa Preparatory School
Kristen Mariotti	Emma Willard School
Ingrid Palmisano	Miami Country Day School
Christina Townsend-Hartz	University School
Sindy Udell	Milton Gottesman Jewish Day School
John Wuorinen	Columbus Academy

SUNDAY, JUNE 25, 2023

5:30 PM - 7:00 PM

Hyatt Regency

Welcome Reception hosted by the AISAP Board of Directors

Make new friends and reconnect with the AISAP Board of Directors as we celebrate each other and welcome you to La Jolla.

MONDAY, JUNE 26, 2023

5:30 PM - 7:00 PM

Hyatt Regency

Poolside Reception: Hosted by AISAP team

After a great first day, join your colleagues and celebrate with a bit of cheer.

TUESDAY, JUNE 27, 2023

6:00 PM - 8:30 PM

Birch Aquarium

Reception and Lite Bites

Transportation provided to San Diego's beautiful Birch Aquarium for an evening of camaraderie.

The AISAP Annual Institute offers an interactive, customizable agenda that can be catered to your professional development goals. As just one example of this approach, we'll provide a space for masters of the profession to share knowledge and resources on the topic that make a tangible difference to your school's bottom line.

MONDAY, JUNE 26

LEADERSHIP LAB: BRAND AND VALUE PROPOSITION

11:30 – 12:20 PM

Presenters: Maria Kadison, CEO, EdwardsCo. and Christina Townsend-Hartz, Director of Admission & Financial Aid, University School

Studies show that word of mouth is the #1 influencer in having families learn about your school and enroll. But what can we do to ensure a more significant impact and create solid relationships with consultants, international student agents, alumni, and town-gown relations?



Track: Leadership & Professionalism (L&D6)

Learning Levels: Advancing (5-9 years), Mastery (Greater than 10 Years)

MONDAY, JUNE 26

LEADERSHIP LAB: PERSONNEL AND TEAM MANAGEMENT

1:30 – 2:20 PM

Presenters: Steve Bristol, The Hun School of Princeton and Vincent Travaglione, Agile Enrollment Solutions

Learn the jobs best assigned to others and which to keep to ourselves when running a good admission office that optimizes enrollment management.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Advancing (5-9 years), Mastery (Greater than 10 Years)

TUESDAY, JUNE 27

LEADERSHIP LAB: DATA

2:30 – 4:00 PM

Presenters: William Kummel, Principal, Rational Partners and Lisa Moreira, Director of Institutional Research & Enrollment Management, Horace Mann School

More and more, you are expected to have a crystal ball and anticipate enrollment. Quick, inexpensive demographics work form the foundation of the information you should be collecting. But what new data should you be tracking? Just as importantly, what should you stop tracking? Answering these questions can give you what you need to build manageable and helpful dashboards that will help you not only make accurate predictions, but course correct where needed.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Advancing (5-9 years), Mastery (Greater than 10 Years)

SUNDAY, JUNE 25

YOU BELONG: THE IMPORTANCE OF COMMUNITY AND BELONGING

2:30 PM - 4:00 PM
REGENCY BALLROOM



Presenter: Charles Vogl, Author, Speaker, Advisor

Charles will share how community and belonging can be built through time-tested principles and rituals. He'll also speak to how organizational leaders can connect the people essential for success. Both through the lens of our enrollment work and our professional practice as Admission and Enrollment practitioners.

MONDAY, JUNE 26

COMMUNITY AND THE FUTURE OF INDEPENDENT SCHOOLS

9:15 AM - 10:00 AM
LCDS AMPHITHEATER



Presenter: Chuck English, Founder, English Marketing Works

In this informative and thought-provoking presentation, Chuck will demonstrate how the future of independent schools can be found at the nexus of educational theory and marketing theory.

TUESDAY, JUNE 27

WHY NET TUITION REVENUE IS NOT "THE ONLY NUMBER THAT MATTERS" | MARKET POSITION, STUDENT POPULATION AND INSTITUTIONAL SUSTAINABILITY

1:15 PM - 2:15 PM
LCDS THEATER



Presenter: William Kummel, Principal, Rational Partners

Join a panel of heads of school for a facilitated discussion on the challenges and opportunities in crafting a sustainable economic model for your school—and all schools.

WEDNESDAY, JULY 13

BRINGING YOUR WHOLE SELF TO YOUR SCHOOL COMMUNITY

10:00 AM - 11:30 AM
REGENCY BALLROOM



Presenter: Bo Bae, Ph.D., Associate, Leadership Coach, and Consultant, Conscious Leadership Academy

Being part of a community open to who you are and how you show up is essential to feelings of belonging and connection. But how do you do that (bring who you are holistically) to your school community? And, in all honesty, do you want to? Bo and her team from The University of San Diego's Conscious Leadership Academy will work with AISAP to unpack and have meaningful conversations about identity, finding one's inner voice, and showing up authentically in various spaces. What a great way to start your summer, conclude your AISAP Annual Institute experience, and connect to your colleagues in the profession.

All content is connected to AISAP’s Learning and Development Framework.

The Learning and Development Framework is the result of a landmark project by the Association of Independent School Admission Professionals (AISAP) to identify professional competencies, skills, and standards that remarkable admission and enrollment professionals share.

This year’s agenda reflects each of the six Professional Standards and Skills defined in the Framework that every enrollment professional should exhibit. Customize your agenda with these distinct content tracks:

- **Ethical Conduct (L&D1):** Maintain high standards of integrity and ethical behavior with all constituents served
- **Operational Excellence (L&D2):** Advance the mission of the school using best practices in admission and enrollment management
- **Marketing & Communication (L&D3):** Demonstrate exemplary communication skills and practices
- **Revenue and Financial Management (L&D4):** Understand the school’s economic context, revenue streams, and financial management and their implications for admission and enrollment management
- **Data to Drive Strategy (L&D5):** Maintain current knowledge of local, regional, national, and global educational policies, practices, and programs
- **Leadership and Professionalism (L&D6):** Model best practices in management and organizational development

You can also select sessions based on these experience levels:

- (0-2 years) Entering
- (3-5 years) Emerging
- (5-9 years) Advancing
- (Greater than 10 Years) Mastery

AISAP Continuing Education Credits (CECs) will be available to all participants to enhance their work toward the AISAP Credential (AEMP).

All Standards and Skills sessions will be held in La Jolla Country Day School classrooms. Room assignments will be shared each day.

THE ESSENTIAL PARTNERSHIP: ENROLLMENT MANAGEMENT AND MARKETING 10:30 AM - 11:20 AM

Presenters: Ann Miller and Michelle Levi, Greens Farms Academy
Enrollment success at your school must include a successful, collaborative relation with your marketing team.



Track: Marketing & Communication (L&D3)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

MISSION DRIVEN ENROLLMENT STRATEGIES 10:30 AM - 11:20 AM

Presenter: Kristen A. Mariotti, Emma Willard School

We will examine how grounding ourselves in mission can lead to increased brand recognition, elevated interest, robust enrollments, and excellent retention at our schools.



Track: Operational Excellence (L&D2)

Learning Levels: All

READING ADMISSIONS FILES WITH AN EQUITY LENS 10:30 AM - 11:20 AM

Presenter: Devin LaSane, Allen-Stevenson School

Examine the hidden, internalized biases we all carry when reading admissions files.



Track: Ethical Conduct (L&D1)

Learning Levels: All

HOW TO SUPPORT FAMILIES OF STUDENTS WITH DIVERSE LEARNING NEEDS 10:30 AM - 11:20 AM

Presenters: Tricia Xavier, Westmark School; Marsille Reed, Waverly School
Learn best practices for supporting students with diverse learning needs and their families through the admissions process.



Track: Operational Excellence (L&D2)

Learning Levels: All

A BLUEPRINT FOR USING INBOUND MARKETING 10:30 AM - 11:20 AM

Presenter: Brendan Schneider, SchneiderB Media Inc.

We will discuss the theory behind inbound marketing and provide tactical examples.



Track: Marketing & Communication (L&D3)

Learning Levels: Entering (0-2 years), Emerging (3-5 years), Advancing (5-9 years)

ADMISSION 101 - THE PLAYBOOK TO GETTING STARTED 10:30 AM - 11:20 AM

Presenter: Miriam Stein, Saddlerock Strategies

If you're new to admission, or never had anyone teach you the basic foundation, this tutorial is for you.



Track: Operational Excellence (L&D2)

Learning Levels: Entering (0-2 years Admission and Enrollment experience)

SETTING SAIL FOR A SUCCESSFUL 24-25 FINANCIAL AID SEASON! 10:30 AM - 11:20 AM

Presenter: Alisa Evans, Mission Enrollment

We will help you chart a smooth course by leveraging data for budget forecasting, confirming goals with the board, and ensuring policies and protocols reflect your school mission and population.



Track: Revenue & Financial Management (L&D43)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

LEGAL ISSUES IN ADMISSIONS: A DEEP DIVE AND PRACTICAL GUIDANCE 10:30 AM - 11:30 AM

Presenter: Janice Gregerson, Venable LLP

We will focus on those areas in the admissions lifecycle where admissions professionals should be attuned to potential legal risks and pitfalls, as well as risk mitigation strategies to ensure admissions processes are consistent with high ethical standards, and also meet the operational needs of the institution. We will review the various federal laws which govern certain considerations in admissions. We will also review best practices and legal considerations in further vetting potential students and their families.



Track: Ethical Conduct (L&D1)

Learning Levels: All

DATA COLLECTION BEST PRACTICES FOR OPERATIONAL EXCELLENCE 10:30 AM - 11:20 AM

Presenter: Sarah Burnett, Flint Hill School

Strategic data collection and regular reporting can help any institution improve decision making and achieve operational excellence. Join us to find out which data to collect and how to put it to good use.



Track: Operational Excellence (L&D2)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

SPREADSHEET SKILLS FOR ADMISSION & ENROLLMENT | BEGINNERS 10:30 AM - 11:20 AM

Presenter: Linda Haitani, Clarity Tuition

Are you an enrollment professional looking to improve your data analysis skills? In the first of three sessions, we will work with Google Sheets to power through useful tips and techniques for cleaning your data, using real-life data challenges commonly faced in admissions.



Track: Data to Drive Strategy (L&D5)

Learning Levels: Entering (0-2 years), Emerging (3-5 years)

GO BEYOND THE BASICS TO PROMOTE EQUITY AND INCLUSION IN YOUR COMMUNICATIONS 11:30 AM - 12:20 PM

Presenter: Jan Abernathy, The Browning School

Learn actionable steps that will make your communications align even more clearly with your values.



Track: Ethical Conduct (L&D1)

Learning Levels: All

FINANCIAL AID METHODOLOGY: THE PANEL DEBATE

11:30 AM - 12:20 PM

Presenter: Drew Coco, Clarity Tuition

We'll have a panel-style presentation debating some of the more detailed and nuanced elements of Financial Aid Methodology.



Track: Operational Excellence (L&D2)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

LEGAL ISSUES IN ADMISSIONS: AN OVERVIEW AND IMPORTANT LEGAL UPDATES

11:30 AM - 12:20 PM

Presenter: Janice Gregerson, Venable LLP

We will focus on those areas in the admissions lifecycle where you should be attuned to potential legal risks and pitfalls, as well as risk mitigation strategies to ensure admissions processes are consistent with high ethical standards, and also meet your operational needs



Track: Ethical Conduct (L&D1)

Learning Levels: All

THE SUSTAINABILITY OF SMALL INDEPENDENT SCHOOLS

11:30 AM - 12:20 PM

Presenter: Scott Collins, University School of Nashville

We will cover what some small independent school leaders have done to help their schools to become or remain sustainable in a competitive educational marketplace.



Track: Data to Drive Strategy (L&D5)

Learning Levels: All

WHY YOUR SCHOOL? CREATING AND LEVERAGING A COMPELLING VALUE PROPOSITION

11:30 AM - 12:20 PM

Presenters: Hugh Jebson and Gail Kelley, St. John's Episcopal School

Learn to differentiate your school through a compelling value proposition.



Track: Marketing & Communication (L&D3)

Learning Levels: All

TICK, TICK, TICK: BUILDING YOUR 52-WEEK ENROLLMENT MANAGEMENT OPERATIONAL CALENDAR

11:30 AM - 12:20 PM

Presenter: Vincent Travaglione, Agile Enrollment Solutions

Effective project management and strengthened enrollment management operations are rooted in the development of a comprehensive 52-week operational calendar.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

USING SURVEYS STRATEGICALLY TO ADVANCE YOUR SCHOOL'S MISSION

11:30 AM - 12:20 PM

Presenter: Robin Parrish, FACTS

There is no time like the present to start (or review and revamp) your school's survey strategy to ensure you are making data-driven decisions.



Track: Operational Excellence (L&D2)

Learning Levels: Learning Levels: Emerging (3-5 years)

CHATGPT! IMPROVE YOUR PROFESSIONAL LIFE THROUGH AI TODAY 11:30 AM - 12:20 PM

Presenter: Jesse Roberts, Unbound360

Learn how ChatGPT and Artificial Intelligence can enhance admission, enrollment, and financial aid processes at your school.



Track: Operational Excellence (L&D2)

Learning Levels: All

TAKE A LOOK AT RETENTION THROUGH THE LENS OF COMMUNITY LIFE 11:30 AM - 12:20 PM

Presenters: Anna Moore and Elizabeth Gregory, St. Paul's Episcopal School

Our goal is to share our unique organizational structure and how implementing a Community Life team can contribute to a high retention rate.



Track: Operational Excellence (L&D2)

Learning Levels: All

TOP 10 TIPS FOR NEW ADMISSION PROFESSIONALS 11:30 AM - 12:20 PM

Presenter: Ingrid Palmisano, Miami Country Day School

If you are new to admissions, this session is for you. We will cover the basics and take a poll as we move through a beginner's discussion on all things admission-related.



Track: Operational Excellence (L&D2)

Learning Levels: Entering (0-2 years)

LEADERSHIP LAB: BRAND AND VALUE PROPOSITION 1:30 AM - 2:20 PM

Presenters: Maria Kadison, EdwardsCo. and Christina Townsend-Hartz, University School

Studies show that word of mouth is the #1 influencer in having families learn about your school and enroll. But what can we do to ensure a more significant impact and create solid relationships with consultants, international student agents, alumni, and town-gown relations?



Track: Leadership & Professionalism (L&D6)

Learning Levels: Advancing (5-9 years), Mastery (Greater than 10 Years)

RECESSION PROOF YOUR ENROLLMENT WITH A STRATEGIC ENROLLMENT PLAN 1:30 PM - 2:20 PM

Presenters: Cindy Udel and Lindsey Marks, Milton Gottesman Jewish Day School of the Nation's Capital

We'll focus on growing enrollment during a recession with an intentional and strategic marketing plan.



Track: Marketing & Communication (L&D3)

Learning Levels: Entering (0-2 years), Emerging (3-5 years), Advancing (5-9 years)

LEGAL ISSUES IN ADMISSIONS: CREATING AND ENFORCING AN ENROLLMENT CONTRACT 1:30 PM - 2:20 PM

Presenter: Janice Gregerson, Venable LLP

We will review the best practices of creating enrollment contracts, ensuring authenticity of signatures and address the considerations in adopting annual versus "evergreen" enrollment contracts.



Track: Ethical Conduct (L&D1)

Learning Levels: All

TOP TEN TIPS TO TRANSFORM YOUR RESUME

1:30 PM - 2:20 PM

Presenter: Angela Brown, Dana Hall School

Tips to give your resume a much-needed facelift.



Track: Leadership & Professionalism (L&D6)

Learning Levels: All

DATA VISUALIZATION TO DRIVE STRATEGIC DECISIONS

1:30 PM - 2:20 PM

Presenter: Susie Gill, Enquiry Tracker

Get examples of the right charts for reporting, and how to dissect the data in a way that allows you to make more informed decisions.



Track: Data to Drive Strategy (L&D5)

Learning Levels: Entering (0-2 years Admission and Enrollment experience), Emerging (3-5 years as an A&EM professional or Director), Advancing (5-10 years as an A&EM professional or A&EM Director)

READING ADMISSIONS FILES WITH AN EQUITY LENS (ENCORE SESSION)

1:30 PM - 2:20 PM

Presenter: Devin LaSane, Allen-Stevenson School

Examine the hidden, internalized biases we all carry when reading admissions files.



Track: Ethical Conduct (L&D1)

Learning Levels: All

GO BEYOND THE BASICS TO PROMOTE EQUITY AND INCLUSION IN YOUR COMMUNICATIONS (ENCORE SESSION)

1:30 PM - 2:20 PM

Presenter: Jan Abernathy, The Browning School

Learn actionable steps that will make your communications align even more clearly with your values.



Track: Ethical Conduct (L&D1)

Learning Levels: All

ENROLLMENT MANAGEMENT: A PLAY IN 3 ACTS!

1:30 PM - 2:20 PM

Presenters: Patty Bloom and Saul Mirowitz, Jewish Community School

How to recruit the right students... and keep them until graduation!



Track: Operational Excellence (L&D2)

Learning Levels: Entering (0-2 years), Emerging (3-5 years)

CHANGING MINDS

1:30 PM - 2:20 PM

Presenter: Elyn Roberts, Ubiquitous

A scientific approach to increasing website visits & conversions.



Track: Marketing & Communication (L&D3)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

MASTERMIND DISCUSSION: COMMUNITY AND THE FUTURE OF INDEPENDENT SCHOOLS

1:30 PM - 2:20 PM

Presenter: Chuck English, Founder, English Marketing Works

Share ideas, tackle challenges, and brainstorm possibilities related to the community and the future of independent schools.



Track: Marketing and Communication (L&D3)

Learning Levels: All

SCHOOL MARKETING TO FIND NEW FAMILIES

1:30 PM - 2:20 PM

Presenter: Jono Landon, CEO, Hubbli, Inc

Case studies of how to enroll up to 90 new families in 6 months.



Track: Operational Excellence (L&D2)

Learning Levels: Entering (0-2 years), Emerging (3-5 years), Advancing (5-9 years)

ART OF THE INTERVIEW

2:30 PM - 4:00 PM

Presenter: Inez Odem, TEAM LEWIS

We'll take you through a series of "conversations" that you will experience with students and family members who are seeking admission.



Track: Ethical Conduct (L&D1)

Learning Levels: Entering (0-2 years), Emerging (3-5 years)

RETHINKING AFFORDABILITY: VISION, STRATEGY AND DESIGN FOR FINANCIAL AID INNOVATION

2:30 PM - 4:00 PM

Presenter: Mark Mitchell, NAIS

Applying concepts and tools from NAIS's suite of Strategy Lab workshops and resources, we will provide a strategic pathway for school leaders to think about how to innovate in their tuition pricing and financial aid work.



Track: Leadership & Professionalism (L&D6)

Learning Levels: All

READING STUDENT PSYCHOEDUCATIONAL EVALUATIONS JUST GOT EASIER

2:30 PM - 4:00 PM

Presenter: Caryl Frankenberger, Frankenberger Associates

What you can learn from the psychoeducational evaluations you read?



Track: Ethical Conduct (L&D1)

Learning Levels: Entering (0-2 years), Emerging (3-5 years)

IDENTITY CURRICULUM AND OTHER ANTI-BIAS INITIATIVES

2:30 PM - 4:00 PM

Presenters: Lisa Moreira and Tom Kelly, Horace Mann School

A review on identity curriculum and other anti-bias initiatives including school policy, data collection, and student-driven activities and programs.



Track: Data to Drive Strategy (L&D5)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

GOOGLE ANALYTICS 4 FOR ENROLLMENT MARKETING 2:30 PM - 4:00 PM

Presenter: Angie Ward, Enroll Media Group

From tactical set-up to strategic reporting, we will leave you feeling empowered and prepared to get the most of Google Analytics 4 for your enrollment marketing needs.



Track: Marketing & Communication (L&D3)

Learning Levels: All

SPREADSHEET SKILLS FOR ADMISSION & ENROLLMENT | INTERMEDIATE 2:30 PM - 4:00 PM

Presenter: James Eberhart, Chadwick School

Learn how to use intermediate-level spreadsheet techniques for use in admission and enrollment.



Track: Data to Drive Strategy (L&D5)

Learning Levels: All

CHATGPT AND ENROLLMENT MANAGEMENT: A DEEP DIVE INTO THE POSSIBILITIES 2:30 PM - 4:00 PM

Presenter: Jesse Roberts, Unbound360

We will go deep into the possibilities of this exciting technology, providing you with the tools you need to harness the power of ChatGPT in your professional environment.



Track: Data to Drive Strategy (L&D5)

Learning Levels: All

LEADERSHIP LAB: PERSONNEL AND TEAM MANAGEMENT 2:30 PM - 4:00 PM

Presenters: Steve Bristol, The Hun School of Princeton and Vincent Travaglione, Agile Enrollment Solutions

Learn the jobs best assigned to others and which to keep to ourselves when running a good admission office that optimizes enrollment management.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Advancing (5-9 years), Mastery (Greater than 10 Years)

EQUITY AND COLLABORATION IN ADMISSIONS: SUCCESSFUL STAKEHOLDER COMMUNICATION 2:30 PM - 4:00 PM

Presenters: Wendy Falchuk, Kingsley Montessori School and Gina Carballo, Northfield Mount Hermon School

Identify key internal and external stakeholders to support admissions efforts with a focus on effective communication and collaboration for message alignment and supporting equity in the admissions process.



Track: Marketing and Communication (L&D3)

Learning Levels: All

All Standards and Skills sessions will be held in La Jolla Country Day School classrooms. Room assignments will be shared each day.

BACK TO IN-PERSON ADMISSIONS AND ENROLLMENT—WHAT HAVE WE LEARNED? 9:00 AM - 9:50 AM

Presenter: Lisa Moreira, Horace Mann School

A discussion of process changes as we moved from in person to online and back, and a summary of the changes we decided to keep (or modify but not eliminate) moving forward.



Track: Operational Excellence (L&D2)

Learning Levels: Entering (0-2 years), Emerging (3-5 years), Advancing (5-9 years)

MARKETING AUTOMATIONS: CREATE ADMISSIONS JOURNEYS THAT CONVERT (WHILE SAVING TIME!) 9:00 AM - 9:50 AM

Presenter: Jamie Giblett, Digistorm

We'll show you how to create top-notch admissions journeys while saving time.



Track: Marketing & Communication (L&D3)

Learning Levels: Emerging (3-5 years)

ADMISSIONS EVENTS YOU WOULD ACTUALLY WANT TO ATTEND 9:00 AM - 9:50 AM

Presenters: Anna Moore and Elizabeth Gregory, St. Paul's Episcopal School

Break the cycle of boring admissions events.



Track: Operational Excellence (L&D2)

Learning Levels: All

USING DATA TO DRIVE TARGETED RECRUITMENT EFFORTS 9:00 AM - 9:50 AM

Presenters: Dana Nelson-Isaacs, DNI Consulting; Maile Uohara, Punahou School

How market data can be used to recruit specific students in line with school mission and goals.



Track: Data to Drive Strategy (L&D5)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

INCREASING INTER-DIVISION RETENTION RATES 9:00 AM - 9:50 AM

Presenter: Lauren South, Flint Hill School

Discuss strategies to increase retention rates among students moving between divisions.



Track: Operational Excellence (L&D2)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years)

WHAT WE LEARNED FROM OVER 35,000 APPLICATIONS 9:00 AM - 9:50 AM

Presenter: Brennan Stark, Clarity Tuition

We will share insights gained from tens of thousands of financial aid applications.



Track: Data to Drive Strategy (L&D5)

Learning Levels: All

YOUR RESPONSIBILITY IN EDUCATING YOUR HEAD IN ALL THINGS ADMISSIONS

9:00 AM - 9:50 AM

Presenter: Jeff Escobar, SLS Preschool

Savvy Admission Directors will strategize ways to educate their Heads of School about all things admission and make them think it was their idea.



Track: Ethical Conduct (L&D1)

Learning Levels: Entering (0-2 years), Emerging (3-5 years)

YOU CAN'T DO IT ALL BY YOURSELF!

9:00 AM - 9:50 AM

Presenter: Rebecca Malotke-Meslin, Pleasantly Aggressive

Stop trying to find more time, start asking for help, and let go of tasks that aren't getting you closer to your goals.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years),
Mastery (Greater than 10 Years)

FOUNDATIONAL CHARACTER-BASED ASSESSMENT FOR STUDENTS 11 & OVER

9:00 AM - 9:50 AM

Presenters: Ray Diffley, RD3 Education & Advising Center and JT Cochrane, new 8th grader, The Bishop's School

See what a new foundational character based "assessment" can look like for your admission process or your school post-enrollment.



Track: Leadership & Professionalism (L&D6)

Learning Levels: All

DETOURS, ROADBLOCKS, AND POTHOLES: CLEARING THE PATH FOR A SMOOTH FAMILY JOURNEY

9:00 AM - 9:50 AM

Presenter: Scott Delleville, Finals site

We will help your marketing and admissions teams see how working together can help identify bumps in your customers' journey.



Track: Marketing & Communication (L&D3)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years)

ENHANCING SCHOOL CULTURE AS A KEY COMPONENT OF ENROLLMENT MANAGEMENT

10:00 AM - 10:50 AM

Presenter: Steve Salvo, St. Mary's Episcopal Day School

Enrollment Management professionals must also serve as School Culture Specialists as it relates to attracting and retaining mission appropriate students and families in an ever-changing competitive landscape.



Track: Operational Excellence (L&D2)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years),
Mastery (Greater than 10 Years)

IT'S NOT THEM, IT'S YOU: WHY FAMILIES MIGHT BE BREAKING UP WITH YOUR SCHOOL

10:00 AM - 10:50 AM

Presenter: Scott Delleville, Finals site

We'll identify some of the most common mistakes that might be hurting your retention—and how to fix them!



Track: Revenue and Financial Management (L&D4)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years),
Mastery (Greater than 10 Years)

DELIGHTING FAMILIES WITH THE RED CARPET EXPERIENCE: CXP AND THE CAMPUS VISIT

10:00 AM - 10:50 AM

Presenters: Matt Pulley and Gregg Ledbetter, Pulaski Academy

Your school and community can create an amazing customer experience, delighting and wowing families by implementing an intentional customized "red carpet" experience.

Track: Marketing & Communication (L&D3)

Learning Levels: All



LEADING FROM THE MIDDLE: HOW ADMISSIONS, MARCOM, AND ADVANCEMENT DIRECTORS CAN BECOME EFFECTIVE 360-DEGREE LEADERS

10:00 AM - 10:50 AM

Presenter: Lisa Howell, Delaware Valley Friends School

Explore the unique leadership challenges of independent school "middle managers" and share strategies for effectively leading and influencing up, down, and across your organizations.

Track: Leadership & Professionalism (L&D6)

Learning Levels: Emerging (3-5 years)



CREATING AN EXTRAORDINARY PARENT AMBASSADOR PROGRAM

10:00 AM - 10:50 AM

Presenter: Sindy Udell, Milton Gottesman Jewish Day School of the Nation's Capital

Create a parent ambassador program to help increase enrollment and stem attrition.

Track: Marketing & Communication (L&D3)

Learning Levels: Entering (0-2 years), Emerging (3-5 years), Advancing (5-9 years)



CREATING A MORE GENDER-INCLUSIVE ADMISSIONS PROCESS

10:00 AM - 10:50 AM

Presenter: Vivien Valenzuela Mallick, The Bishop's School

Be sure that your school is truly prepared to support and serve your gender-expansive students.

Track: Operational Excellence (L&D2)

Learning Levels: All



IMPROVING YOUR SCHOOL'S BRAND AND APPLYING IT TO ALL SCHOOL MARKETING

10:00 AM - 10:50 AM

Presenter: Jim Healey, Peapod Design

You will gain the tools needed to boost your school's brand and become the master influencer of your school.

Track: Marketing & Communication (L&D3)

Learning Levels: All



ARE YOU PLAYING CHESS OR CHECKERS?

10:00 AM - 10:50 AM

Presenters: Drew Coco, Clarity

Examine how a Net Tuition Revenue Strategy can empower enrollment professionals to gain a seat at the table.

Track: Revenue and Financial Management (L&D4)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)



TICK, TICK, TICK: BUILDING YOUR 52-WEEK ENROLLMENT MANAGEMENT OPERATIONAL CALENDAR (ENCORE SESSION)

10:00 AM - 10:50 AM

Presenter: Vincent Travaglione, Agile Enrollment Solutions

Effective project management and strengthened enrollment management operations are rooted in the development of a comprehensive 52-week operational calendar.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

PRACTICAL TOOLS FOR PRODUCTIVE OFFICE RETREATS

11:00 AM - 12:15 PM

Presenters: James Eberhart, Chadwick School; Susan Emery, Kingswood-Oxford School

A mock end-of-season retreat of both the enrollment and financial aid offices that focuses on measuring success, tying indicators to goals, and course correcting.



Track: Operational Excellence (L&D2)

Learning Levels: All

YOU SHOULD BE MARRIED TO YOUR DATA 11:00 AM - 12:15 PM

Presenters: Alexis Newman and Lindy Kadouri, Milken Community School

A systematic approach to using data on a weekly basis to drive moves management.



Track: Data to Drive Strategy (L&D5)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years)

STRATEGIC AND SUSTAINABLE ENROLLMENT PLANNING

11:00 AM - 12:15 PM

Presenters: Allison Letourneau, Berkshire School; Steve Bristol, Hun School of Princeton

We will share tangible examples of our respective SEM plans as we walk participants through how our plans, at two different institutions, were created, shared, and how they are used in practice.



Track: Operational Excellence (L&D2)

Learning Levels: Emerging (3-5 years), Advancing (5-9 years), Mastery (Greater than 10 Years)

CREATING EFFECTIVE AND CONSISTENT BOARD REPORTS

11:00 AM - 12:15 PM

Presenter: Karla Vargas, Woodberry Forest School

Bring your goals and data and learn how to put together an informative board report that meets your departmental goals.



Track: Operational Excellence (L&D2)

Learning Levels: Emerging (3-5 years)

ENROLLMENT GROWTH MINDSETS: HOW TO RESIST (AND REVERSE) ENROLLMENT DECLINE

11:00 AM - 12:15 PM

Presenter: Olaf Jorgenson, Almaden Country Day School

We'll provide 12 enrollment growth mindsets that position school leaders and admissions professionals to successfully combat enrollment decline.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Emerging (3-5 years)

CREATE INCLUSIVE ADMISSIONS MESSAGES THAT WELCOME YOUR WHOLE COMMUNITY 11:00 AM - 12:15 PM

Presenters: Romaine Levee and Tierney Yates, Mission Minded

We will teach admissions professionals how to shift your school's brand and key messages to reflect your commitment to diversity, equity, inclusion, and belonging.



Track: Marketing & Communication (L&D3)

Learning Levels: Advancing (5-9 years)

USING TECHNOLOGY TO CLOSE THE GAP BETWEEN ADMISSIONS AND YOUR ACADEMIC ENVIRONMENT 11:00 AM - 12:15 PM

Presenters: Kathryn Wheeler and Dr. Elizabeth Clarkson, OpenApply

The knowledge pipeline between your admissions process and academic environment has never been more critical than it is now.



Track: Marketing & Communication (L&D3)

Learning Levels: Entering (0-2 years), Emerging (3-5 years)

A TOOLKIT FOR CHANGE: APPLYING AGILE METHODOLOGIES TO PROCESS CHANGES AT YOUR SCHOOL 11:00 AM - 12:15 PM

Presenter: Megan Fangmeyer, FACTS

Learn how to apply the tools and concepts of agile development to continuously improve and manage changes at your school and in your department.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Entering (0-2 years), Emerging (3-5 years), Advancing (5-9 years)

LEARNING FROM CORPORATE AMERICA TO REIMAGINE MARKETING AT INDEPENDENT SCHOOLS 11:00 AM - 12:15 PM

Presenter: Nija Meyer, Woodward Academy

Although independent schools prefer to think of us as anything but a business, it's time to learn from Corporate America to deliver an exceptional "customer" experience that will improve both retention and recruitment.



Track: Marketing & Communication (L&D3)

Learning Levels: All

SCHOOL FINANCES AND CONSIDERING BUDGET OPTIONS DURING A YEAR WITH ANTICIPATED HIGH INFLATION 11:00 AM - 12:15 PM

Presenters: Lisa Moreira and Thomas Kelly, Horace Mann School

A review of how one school tackled the annual budget process in a different way anticipating a year with high inflation and rising school costs.



Track: Revenue and Financial Management (L&D4)

Learning Levels: Advancing (5-9 years), Mastery (Greater than 10 Years)

AGILE LEADERSHIP TOOLKIT 2:30 PM - 4:00 PM

Presenter: Heather Carreiro, Midland School

Learn to leverage project management tools to improve outcomes and build collaboration within and across teams.



Track: Leadership & Professionalism (L&D6)

Learning Levels: All

SIX QUESTIONS TO SHAPE YOUR 2023 TUITION AND ENROLLMENT STRATEGY

2:30 PM - 4:00 PM

Presenters: Shana Abner; Craig Dodson, Community Brands

Identify leading indicators of tuition health, net tuition best practices, and financial aid strategies to pair with competitive admissions.



Track: Operational Excellence (L&D2)

Learning Levels: All

HOW TO COMBAT BIAS IN HIRING AND SELECTION PROCESSES

2:30 PM - 4:00 PM

Presenter: Melissa Mirza, Pollyanna

We will examine where common hiring practices open up search teams to be swayed by biases.



Track: Ethical Conduct (L&D1)

Learning Levels: All

TEN THINGS YOU SHOULD KNOW ABOUT CHINA & WHY THEY MATTER

2:30 PM - 4:00 PM

Presenters: Nini Suet, Max Zhang; Ray Diffley, Shang NancyFriends Int'l Education Group

Everything you need to know about China, Sino-US relations and how it will impact enrollment moving forward.



Track: Data to Drive Strategy (L&D5)

Learning Levels: All

USING POWER BI TO MAKE INFORMED DATA DECISIONS

2:30 PM - 4:00 PM

Presenters: Kathleen Steinman, New Canaan Country School; Matt Clemmens, Clemmens Consulting

Building real-time, interactive dashboards with Blackbaud and Power BI.



Track: Data to Drive Strategy (L&D5)

Learning Levels: Advancing (5-9 years)

LEADERSHIP LAB: DATA

2:30 PM - 4:00 PM

Presenters: William Kummel, Rational Partners; Lisa Moreira, Horace Mann School

More and more, you are expected to have a crystal ball and anticipate enrollment. Quick, inexpensive demographics work form the foundation of the information you should be collecting. But what new data should you be tracking? Just as importantly, what should you stop tracking. Answering these questions can give you what you need to build manageable and helpful dashboards that will help you not only make accurate predictions but course correct where needed.



Track: Leadership & Professionalism (L&D6)

Learning Levels: Advancing (5-9 years), Mastery (Greater than 10 Years)

TUESDAY, JUNE 27 STANDARDS & SKILLS SESSIONS

DEIJ AND ADMISSION ASSESSMENT

2:30 PM - 4:00 PM

Presenter: Molly Green, ERB

Take a deep dive into an analysis of a joint program between ERB and Test Innovators, a leading provider of admission test practice, to provide access to quality test preparation for all students.



Track: Operational Excellence (L&D2)

Learning Levels: All

SPREADSHEET SKILLS FOR ADMISSION AND ENROLLMENT | ADVANCED

2:30 PM - 4:00 PM

Presenter: Drew Coco, Clarity Tuition

We'll build on the skills covered in the first two sessions and dive into various ways to put your data to work so that you can glean the insights you need to make sound data-driven decisions. You will walk away with a Google Sheet that includes formulas, scenarios, and samples of the topics covered in this session.



Track: Data to Drive Strategy (L&D5)

Learning Levels: All

SAVE THE DATE

The piece of the puzzle you need



AISAP
Financial Aid Summit
ANDOVER, MA
OCT 25-26, 2023



The professional development you need this fall to ensure fair and equitable financial aid decisions.

SPONSORS

We are very grateful to our 2023 Annual Institute Sponsors, who are here to help maximize the effectiveness of your admission and enrollment processes.

Please feel free to click on any of the details below, visit their websites and connect with them before, during, and after the Annual Institute.

DIAMOND SPONSORS

Clarity

The financial aid platform purpose built to remove enrollment barriers for today's families.

claritytuition.com



Founded in 2009, SNF is China's premier educational advisory that cultivates a global growth mindset.

www.shangnancyfriends.com/?l=en-us

PLATINUM SPONSOR



School financial aid software THAT provides a complete solution & an efficient process to administer a successful financial aid & award program.

communitybrands.com



SPONSORS

GOLD SPONSORS

blackbaud®

Software solutions powering the entire social good community.
blackbaud.com



EDWARDS CO.

Branding, marketing, strategy, and admissions communications for private schools.

edwardsco.com



Designed for the marketing and admissions office to have one integrated solution to manage future families, track demand and grow enrollments.

enquirytracker.net



Enroll Media helps schools drive enrollment growth through digital marketing that works.

www.enrollmediagroup.com



An industry-leading independent educational advisory.

www.erlearn.org

SPONSORS



Solutions that elevate the K-12 experience for school administrators, teachers, and families.

factsmgt.com



An easier way to market your school, manage communications and enrollment, and strengthen your online presence.

www.finalsite.com



An easier way to market your school, manage communications and enrollment, and strengthen your online presence.

metricmarketing.ca



Through proactive marketing and nurturing of prospects, meticulous handling of sensitive data, management of tours and open days, processing of admissions payments, and robust analytics, OpenApply is helping schools supercharge their admissions process.

www.openapply.com

SPONSORS



A brand strategy and creative consulting firm for colleges, universities, independent schools, and corporations.

peapoddesign.com



An inbound marketing agency that helps K-12 schools, colleges, and universities increase traffic and generate more qualified inquiries and applicants.

pepperlandmarketing.com/inbound-marketing-for-schools



Imagines a new way for schools to market and communicate. Unique and individually tailored creative methodology will take your school on a journey of discovery, resulting in beautiful digital experiences that achieve better outcomes.

www.ubiqeducation.com

SILVER SPONSOR



Passionately focused on the ever-changing digital marketing landscape so we can bring you award-winning enrollment design solutions.

truthtree.com

EXHIBITOR



Provides schools with customized financial aid folder review programs.

missionenrollment.com

CONSENT TO USE PHOTOS

Registration and attendance at, or participation in, the AISAP Annual Institute and other activities constitutes an agreement by the registrant allowing AISAP staff to use and distribute (both now and in the future) the registrant's or attendee's image or voice in photographs, video, and electronic reproductions of the conference's events and activities.

DISCLAIMERS

All presentations and their contents and materials are the property of the Association of Independent School Admission Professionals and may not be recorded in any manner whether in video form or still image and is not to be shared in whole or in part with any third parties without the prior written consent of AISAP.

We ask that you please refrain from sharing any part of the presentations on your social media or otherwise without first obtaining consent from AISAP.

The views, opinions, and content expressed in this presentation are solely that of the presenter and do not necessarily reflect the views, opinions, or policies of the Association of Independent School Admission Professionals.

UPCOMING LEARNING OPPORTUNITIES



AISAP
Data to Drive Strategy
VIRTUAL SUMMIT
SEPTEMBER 2023

September 27-28, 2023

Data To Drive Strategy Summit
Online



AISAP
INTERNATIONAL SCHOOLS INSTITUTE
ZURICH, SWITZERLAND
OCTOBER 16-17, 2023

October 16-17, 2023

International Schools Institute
Zurich International School
Zurich, Switzerland



AISAP
Financial Aid Summit
ANDOVER, MA
OCT 25-26, 2023

October 25-26, 2023

Financial Aid Summit
Andover, MA



AISAP
Enrollment Marketing Summit
FEBRUARY 2024

February 2024

Enrollment Marketing Summit
Online



AISAP
DIRECTORS SUMMIT

April 17-18, 2024

Directors Summit with NAIS
Online



AISAP
ANNUAL INSTITUTE
SALT LAKE CITY, UT
JUNE 23-26, 2024

June 23-26, 2024

AISAP Annual Institute
Salt Lake City, Utah

UPCOMING LEARNING OPPORTUNITIES

Sign up now for our online workshops this summer:

- **New to Admission & Enrollment (2 sessions - July 19-20 OR August 9-10)**

If you're new to the world of admissions and enrollment as a profession, this comprehensive workshop will provide you with the skills, knowledge, and resources you need to thrive in your role and contribute to the success of your school.

- **New to Director (2 sessions - July 17-18 OR August 2-3)**

If you are a new Director of Enrollment seeking to build a strong foundation for your role, join us to gain practical knowledge and skills to help you succeed in your new role.

- **Support for Support Staff - September 13-14**

This invaluable resource is for individuals looking to strengthen their skills and knowledge in supporting admissions teams.

Continue to check out our website for upcoming educational and engagement events.

www.aisap.org

Like us on [Facebook](#) and [LinkedIn](#)



SAVE THE DATE

AISAP ANNUAL INSTITUTE
JUNE 23-26, 2024
SALT LAKE CITY, UTAH

www.aisap.org
203-421-7051
PO Box 709
Boston Post Road
Madison, CT 06443