



 COLORADO LEAGUE of  
CHARTER SCHOOLS



# STEP UP

A GUIDE TO SCHOOL MARKETING 2022



[www.coloradoleague.org](http://www.coloradoleague.org)

Dear Colorado League of Charter Schools Members,

For over 28 years, the Colorado League of Charters Schools has supported charter schools in our state — helping schools reach higher levels of student performance and overall success by providing information, training, advocacy, resources, and support.

From the start, the League has been an organization that represents high standards for student achievement in public charter schools. We believe in and act toward the future of high-quality, public school options available to all Colorado students.

An important part of ensuring that Colorado children get the quality education they deserve is letting them know about the options available to them. And while options are critical for the charter school ecosystem, we cannot leave any groups of students behind. We are working on behalf of equity, and ensuring that we are raising up all students, all families, all geographies in the diverse quilt of our landscape.

As part of our marketing and communication support services, we offer you this guide, [Step Up: A Guide to School Marketing](#).

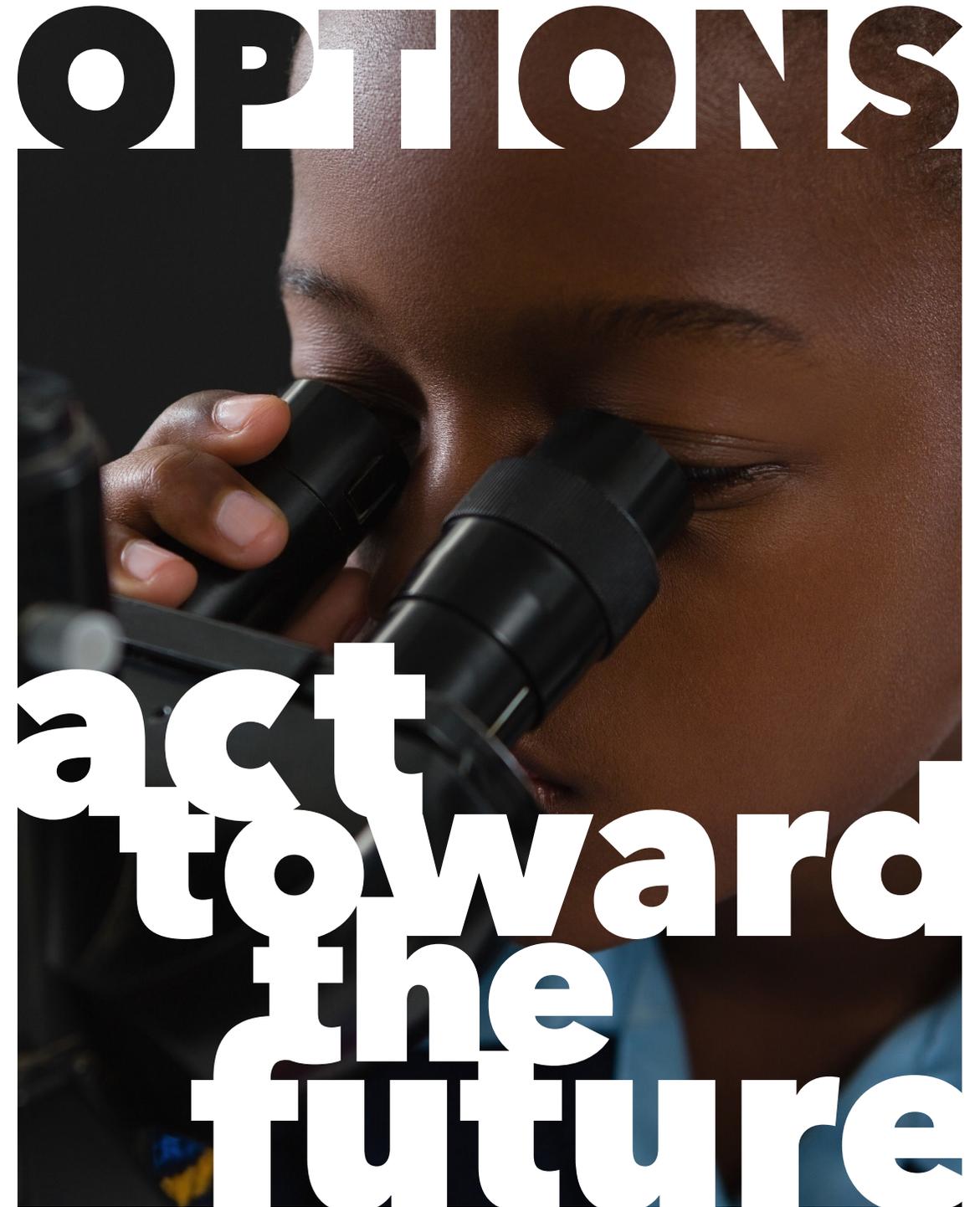
Whether you're just getting started in planning, developing, or launching your new school or are already a fixture in your community and are looking to build enrollment in your school and community, we hope this guide will be helpful as you launch or redevelop your marketing, communication and enrollment efforts.

Please remember that the League is here to support you with your marketing and communications needs including:

- Marketing and communications planning.
- Crisis communications coaching and support.
- Media relations guidance.
- Connections to quality service providers (consultants and vendors).

Please contact us if we can be of assistance with your school's communications and marketing efforts.

Peter Mason, [communications@coloradoleague.org](mailto:communications@coloradoleague.org)  
VP Communications  
Colorado League of Charter Schools



# UNIVERSITY

## THE PARTS: TERMINOLOGY

What is this marketing and communications of which you speak?

Ok, so many in the nonprofit world in general and in schools specifically have a slight recoil when you talk about “marketing” your school. That’s fine. You can call it communications if you like. But in reality, marketing is the effort we undertake to get the word out about your school (service) and help people (families) choose you. This is a big step up for families to understand that (1) there is such a thing as options, (2) learn about the options, and (3) decide on a school that is best for their kid. All that in the context of helping the public overall to understand that charter schools are public, free, open to all, and don’t discriminate on admissions.

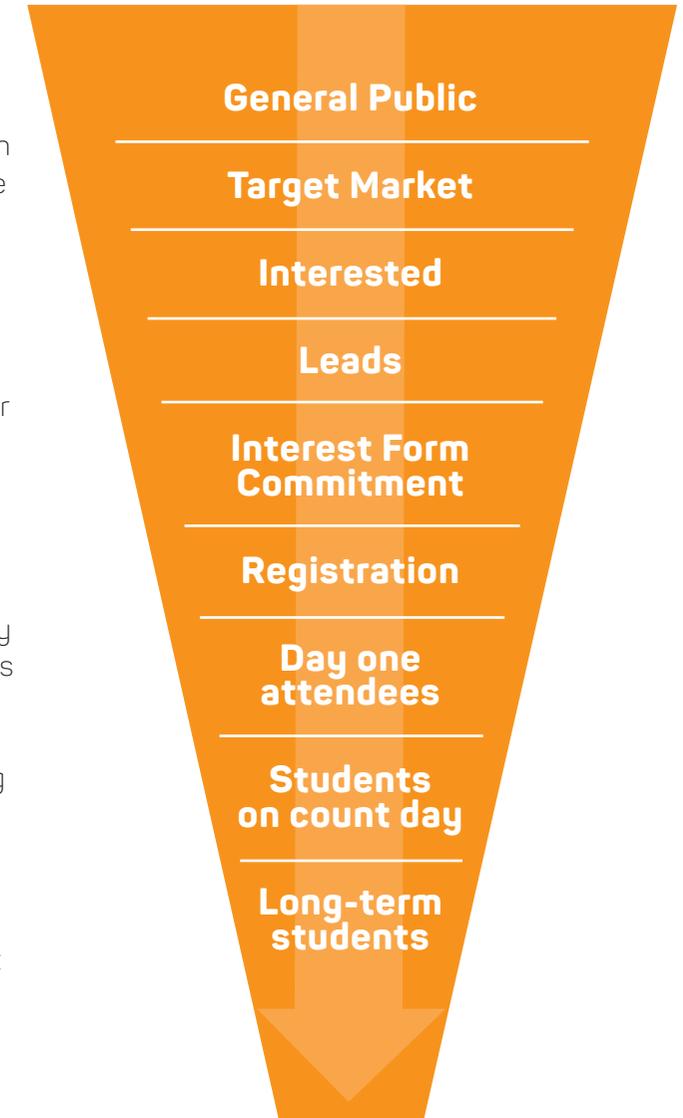
Working in educational marketing for 30+ years I’ve found some pretty consistent patterns to how you can build a pipeline of parents, families and students who will not only beat a path to your door, but sign up on your waitlist.

First let’s just talk about the parts—the individual terms and distinctions that will help guide you through this handbook and build your own marketing plan. These items are pretty universal to marketing, but are also universal to educational marketing/communications. The fundamentals here will help you decide which items you have to accomplish and when. It’s our hope here that you will understand these items, and then build a marketing plan at the back of this book that takes into account all these items.

**Funnel** — See the diagram. The Sales funnel might progress through these items and look something like the diagram below. General Public - Target Market - Interested - Leads - Interest Form Commitment - Registration - Day one attendees - students on count day - long-term students. This progression is needed to help you identify the critical milestones along the way, your tactics, and set goals especially when you are a new school yet to open your doors.

**Interest** — When you look at a vegetable stand and there are 25 different kinds of produce stacked in front of you and you’re deciding which ones to buy, that’s interest. You are interested in vegetables/carrots and you’re showing or demonstrating interest. In a school setting interest is defined by someone coming up to you at a school fair, out of all the booths and wanting to talk to you about your school, as an example. They are interested in “a new school”/your school. Online they may show interest by viewing your website.

**Leads** — When someone shows interest (the carrots above) or if they are more than interested, they will engage with you to find out more about the features and benefits of your school and if they want to “find out more” by giving you an address, email, or phone number, they are a lead. These are the parents with whom you need to engage. The leads are the ones who leave you a voice mail, send you an email, fill out an interest form, stop at your booth, take a virtual tour, or have been talking to the other parents in your school about their son/daughter attending.



# TERMINOLOGY (continued)

**Features** — What are the facts about your product, service, school, curriculum, student body, teachers. The facts are the facts. Information in this context is like having a zipper on a jacket (feature), or having 500 students in your school or 100 students in a grade or 10 kids in a class. These features or facts come across as things like your staff:student ratio. This is data and data doesn't motivate.

**Benefits** — What can someone expect to get out of the situation or will be a positive return on their decision. If the information (the feature) is that a jacket has a zipper, then the benefit is that you can unzip and cool yourself off while you're walking or hiking. Likewise if the information is that your staff:student ratio is 1:10, the benefit is that students will get individualized attention, or smaller class sizes at your school means more support for students in their homework. This is relevant to your families and students and DOES motivate them (to sign up or to step up).

**Motivation** — Motivation is the desire for a certain item, service, outcome, or result that will create an action. One parent's motivation for safety may be realized in a different way for another parent with the same motivation. So understanding motivation at multiple levels is key. My motivation for safety might result in me signing up for traffic duty in the pick up line. Others' motivation for safety might be the deciding factor in which school my children attend. Remember that motivation comes from benefits, not from data.

**Sales** — The process by which we decide to take an action. When we decide to choose a carton of milk at the store, we typically partake of a quick and habitual sales process. Larger items are typically more rigorous, time consuming, and explicit. Sometimes sales are complex with multiple factors (buying a house) and sometimes sales processes are quick and easy (choosing a gas station in which we perhaps balance only convenience and price). Nevertheless, for families to choose your school, they likewise go through a sales process whether you help them or not. And while they may not be paying you directly, they are definitely investing in you.

**Close** — The moment of commitment and the decision. In a school setting, there are a number of minor "closes" as parents might fill out an intent form, a registration form, attend the first day, and then even then decide whether to switch out (or in) during the first week. Knowing that you have these critical moments, then allows you to confirm and affirm their decision process.

**Affirmation** — Thank you — you know that thing when the auto dealer calls after the sale and asks how it's going? That's affirmation. Or when the cashier says to you — 'oh, i bought that stereo too — you bought a really good one.' That's confirming or affirming the sale. There's a little added boost you feel that you made a good choice — the right choice. "Hey nice job finding the best school for your kid." Do you ring a bell, do you call them, do you tell them they made a good choice, do you send them a personal note from the principal thanking them for trusting you with their child?

**Showing up** — Ensuring that your students show up on day one is critical. The attrition between registration and day one can be significant and costly. Showing up is a step in the process not to be ignored. So what kinds of communication and outreach do you do to increase the chances that every application turns into a student on day one.

**Attrition** — Those students who leave between the first day of school and count day (week). This crucial group can cost your school significantly. You've already staffed up, what if you lose 10 students between the first day and count day. That can be over \$90,000 in one year alone. What if those students would have been with you for five years? That's almost a half a million dollars in support for your school.

**Retention** — So you have these parents in your school and they have been counted. Don't let them go! They're your responsibility and customer for the next eight years (or two years, five years, or 12 years). Retain them. Help them to stay! And consider that retention doesn't only mean your students. You should be retaining fans of your school to promote your school and your programs long after their students have graduated. Retain your champion families by continuing to communicate with them, celebrating them, and engaging them where you can.

**Brand** — Brand is just the accumulation of the collective ideas and meaning of your school. Brand is composed of a wide variety of items and isn't just your school colors and your logo. What people believe about your brand (school), what they say, what they write, what you say, what you write, how you behave, your standing (belief) in the wider community, and many more factors are some of the forces that are at play in your brand. Unfortunately you are not in total control of your brand. A scandal for example might "tarnish your brand." But a reputation of being honorable and service oriented by your students and staff might polish your brand. Read more about branding inside this book, but don't mistake it for a color palette, a font, or a logo. Brand is so much more.

# SOME OTHER CONCEPTS, WORDS, DISTINCTIONS...

**Platform** — One of the many ways that you present yourself and your communications in the public. Many types of social media are platforms.

**Copy** — All the written materials that you might write to generate things like a website, a brochure, an email, or a speech. Consider that typically there are some master copy documents from which other items are derivative. Being clear with all your copy, and creating consistency in the language, the tone, the relationship to your brand, your messaging, etc. is crucial to your messaging reinforcing your brand and attracting students and families.

**Advertising** — Strategically placed persuasive messaging in various media venues, designed to communicate the relevance, utility, and other attributes of your school. Using a compelling combination of words and images (both still and moving), focused messages are persuasive tools that can convert prospective fence-sitters as well as generate interest in those who have yet to know anything about your school. These can communicate what differentiates your school from others, time-specific initiatives, or more general awareness building.

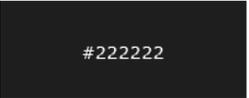
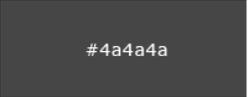
**Imagery** — The pictures (photographs, illustrations, infographics, charts, etc.) that visually accompany your copy. Your choice of imagery is extremely important. It should consistently support and reflect your school's brand. The choice of imagery should always be a conscious one.

**Collateral** — Digital and print tools promoting your school to students, parents, prospective teachers and employees. These may include blog posts, social media, videos, catalogs, brochures, fliers, postcards, and more. Collateral has historically been provided to a customer/user base after an initial contact has been made. It should provide answers to anticipated questions about why they should choose YOUR school over others in the same district. Don't be afraid to address the challenges that schools (including yours) face. This transparency and honesty is a valued trait in our children's education.

**Creative** — There was a time when the word 'creative' was strictly an adjective. We believe that it still should be, but it can also be a noun. In this context, 'creative' also refers to the content that is built to tell your story; the copy that is written, the imagery that is chosen or designed, and the film and video that is produced. Your brochure, your flier, your website, your 30-second commercial can all be 'creative'. Creative can also currently describe a person who specializes in the creation of these resources.

**Palette** — The colors (usually a limited number of them) that have been chosen to represent, identify, and help define your brand. They are often taken from and expanded on the colors used in the visual identity (logo). Through repeated exposure and visual reiteration, the use of a color palette can help identify your school as your school. Think "The Crimson Tide".

## YALE UNIVERSITY PRIMARY COLOR PALETTE

Blues	Grays	Accent Colors
 Yale Blue #00356b	 #222222	 #dddddd
 #286dc0	 #4a4a4a	 #5f712d
 #63aaff	 #978d85	 #bd5319

**Value proposition** — What your school offers that convinces people to choose it over another. You should strive to articulate your value proposition as concisely as possible. Your value proposition should be your elevator speech. It should describe WHY and HOW your school is best prepared to serve the needs of your prospective students.

# KNOW

## COLORADO CHARTERS

These stats are for Colorado. If you're in another state they will differ. Look them up. Know them. Use them.

Stats as of 2021

[www.coloradoleague.org/page/infographics](http://www.coloradoleague.org/page/infographics)

---

**130,000+** STUDENTS ENROLLED

– If charters were a district, it would be the largest district in the state by more than 40%

---

**15%** OF PUBLIC SCHOOL STUDENTS ATTEND CHARTER SCHOOLS IN THE STATE

---

**#2 CHARTER LAW:** The annual ranking by the National Alliance of Public Charter Schools (NAPCS) consistently ranks Colorado 2nd in the nation for its charter school law based on transparency and accountability. [www.publiccharters.org/our-work/charter-law-database](http://www.publiccharters.org/our-work/charter-law-database)

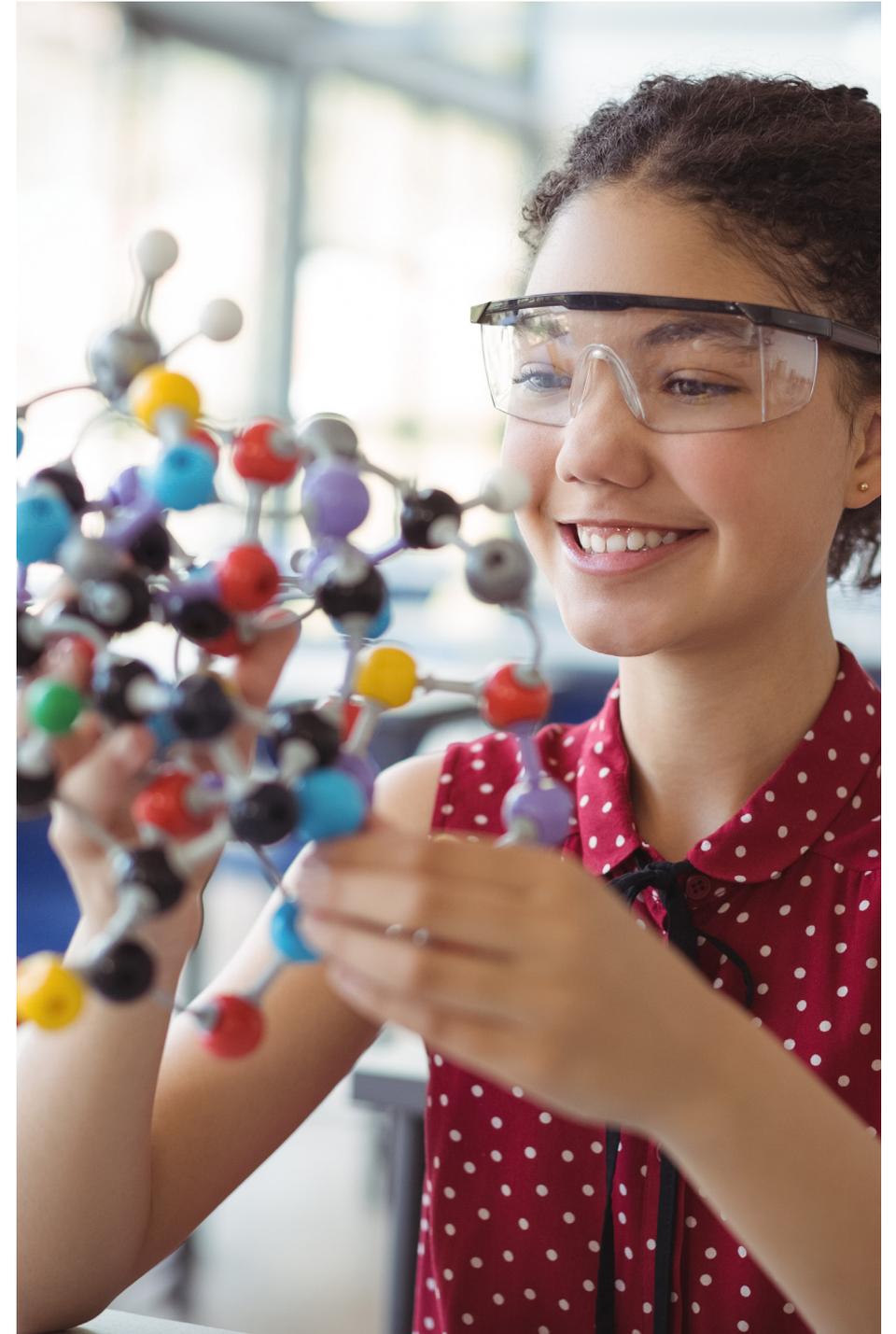
---

**70+** CITIES & TOWNS IN COLORADO SERVED BY CHARTERS

Summary Graphic 2021

[www.coloradoleague.org/page/charternumbers](http://www.coloradoleague.org/page/charternumbers)

LEAGUE RESOURCES:  
[coloradoleague.org/resources](http://coloradoleague.org/resources)  
[www.facebook.com/groups/955935037820997](https://www.facebook.com/groups/955935037820997)



# BRANDING

## WHO ARE YOU?

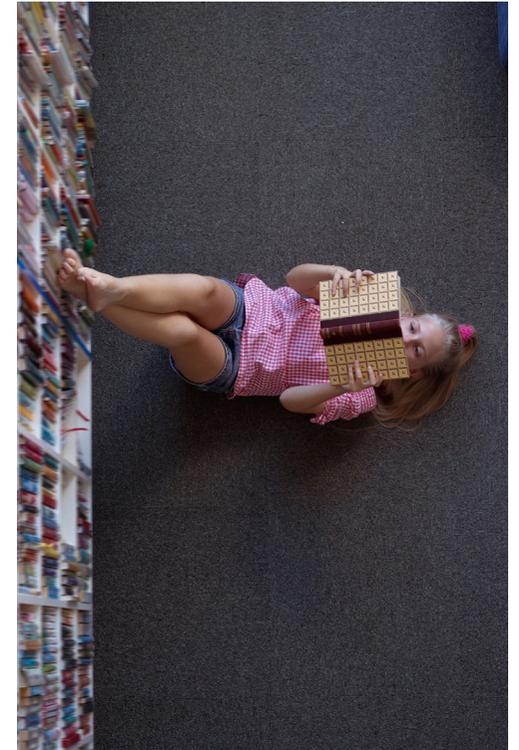
### DEFINE THE EXPERIENCE

The term “Branding” is sometimes thrown around as if it’s a nebulous or complex secret, insider term that only specialists and experts can know how to define or build one. It’s not. Brand is essentially only the total, cumulative impression of your organization—your school. Just remember that a brand isn’t just what you say, it’s a representation of what you say, what people experience, how they interpret your actions and your words, what they read, and especially what they feel and think about you. If you think of your brand as a combination of action, words, and feelings you’re on the right track.

A Brand Book (or Guide) is merely an attempt to document all the aspects of both what you THINK it is and what it truly IS (the reality). The real work is not writing a brand book. The real work is following it, reinforcing it, and hopefully getting all members of your team and community to support it, live by it, and help to reinforce it.

EXAMPLE: If you define in your Brand Book that experiential education is the number one priority of your school and the number one deliverable of your educational model, but you illustrate your website with pictures of students in classrooms, you’ll have a disconnect. If you don’t define experiential education, or don’t make that a regular part of staff, parent and public communications, you won’t reinforce that essential element of your brand. Simple, yes?

The League strongly suggests that you build a basic brand book if you are a new school, to help you define what you do, how you communicate, and discover all the elements that can help you create consistency and momentum with your communications.



### BRANDING (THE FOUNDATION)

- MISSION, VISION, DIRECTION
- TONE
- VALUE PROPOSITION
- VISUAL IDENTITY
- ADVERTISING

- IMAGERY
- COLOR PALETTE
- TYPEFACES
- COPY
- COLLATERAL
- CREATIVE

# WHO ARE YOU? (continued)

## FROM THE INSIDE

Begin the process by clearly articulating what makes your school stand out. Answering the following questions collaboratively with teachers, parents, and students will ensure that everyone speaks uniformly about your school experience (the brand experience).

What words would you use to define your school experience?

What unique programs and services do you offer?

Why do families choose your school?

What does the community value and expect from your school?

## FROM THE OUTSIDE

Aesthetics matter. When schools have the look of being cared for on the inside and outside (well maintained classrooms, building and grounds), it is assumed that the students are cared for as well.

The first visit to your school establishes the tone of the relationship between the school staff and the family. Are your front-line staff image builders or image breakers?

Developing a welcome packet or online resource that answers common questions is a great way to greet new students and parents.

## JUST ASK

Leave out the guesswork. Ask families why they chose your school.

## IMAGE MAKERS

A friendly front office

Promptly answered phones and automated phone directory

Easy-to-navigate website and listed contact information

Rapid response to phone calls and emails

Staff is eager to show off the school

Staff is passionate and knowledgeable about the program

Students say hello to visitors (Never underestimate the power of a smile!)

## SAMPLE BRAND BOOK

The League invites you to use its brand guide to find the pieces of your own school's brand that you'd like to emulate. Not all components are necessary. A Brand Book or Brand Guide should be a living, breathing document that helps you create content, make decisions, and leads to consistency to demonstrate what you bring to students, families and the community. [www.coloradoleague.org/page/marketingcomms](http://www.coloradoleague.org/page/marketingcomms)

### VISUAL IDENTITY

ENSURING THE CONSISTENCY OF OUR MESSAGE

**TYPEFACE: PANTON** Six weights + Italics  
Designed by Ivan Petrov and Simov Svetoslav in 2014

**PANTON Black & Italic**

**PANTON Extra Bold & Italic**

**PANTON Bold & Italic**

PANTON Regular & Italic

PANTON Light & Italic

PANTON Thin & Italic

**TYPEFACE: Akkurat** two weights

**AKKURAT Bold**

**AKKURAT Regular**

### Font & Palette

**COLOR PALETTE**

 C:100 M:80 Y:20 K:50 R:0 G:39 B:83 #002753	 C:50 M:50 Y:80 K:0 R:146 B:127 B:84 #927F54
 C:100 M:67 Y:0 K:38 R:0 G:61 B:121 #00349e	 C:25 M:35 Y:85 K:0 R:198 G:161 B:74 #C6A14A
 C:65 M:44 Y:0 K:25 R:78 G:106 B:156 #4360af	 C:5 M:10 Y:80 K:0 R:242 G:230 B:51 #F2E633
 C:45 M:30 Y:0 K:17 R:121 G:140 B:182 #7494d4	 C:25 M:90 Y:100 K:0 R:193 G:66 B:46 #C1422E
 C:20 M:13 Y:0 K:8 R:184 G:193 B:218 #bccccb	 C:0 M:75 Y:100 K:0 R:242 G:127 B:34 #F27F22
 C:10 M:10 Y:10 K:80 R:78 G:76 B:77 #2e2e2e	 C:0 M:50 Y:100 K:0 R:247 G:148 B:30 #F7941E

Font Note:  
If these fonts are not available to you, use similar sans serif fonts such as calibri when possible.

17

### SUB-BRANDS

PART OF THE LEAGUE FAMILY

### The Collaborative



COLLABORATIVE for  
**EXCEPTIONAL  
EDUCATION**

# EXCEPTIONAL

explore the possibilities



# OVERVIEW

## BEFORE YOU START BUILDING YOUR PLAN

### ASK YOURSELF

#### Total Students:

Are there enough students in the area to start or sustain your school?

**Trends:** Are there demographic trends in your area which are a challenge or an opportunity?

**Competition:** Are current area schools meeting the need for high-quality options?

**Niche:** Are you filling an unfilled niche in your community, district or area, that is unfilled by other schools?

**Differentiation:** How does/will your school stand out?

### Why Market Your School?

#### Competition and Trends

More and more competition in the public school market. Traditional schools, private schools, and other options are requiring all schools to become more sophisticated and communicative with prospective students/families/parents.

Demographic Trends: In many areas demographic trends and environmental factors (lowered birth rates, rising home prices, and other) are creating a lower total number of students.

Traditional schools, private schools, and other options are requiring all schools to become more sophisticated and communicative with prospective students/families/parents.

Choice is becoming normalized.

As parents realize that there are more options, and they become more discerning, they are doing their research on which school is best for their student, or most beneficial for their family overall.

### Per Pupil Revenue is the primary source of funds to teach your kids.

More than fundraising, more than any other source, per pupil revenue is critical to ensuring that you can serve the student. Your swings in enrollment up or down are critical to the sustainability of your non-profit and educational vision.

You have to do more with less. Because charter schools typically have no access to facilities at the district level, they have to use resources on facilities that squeeze resources in other ways. This creates a mentality that can make it harder to allocate funds to enrolling students.



# FOUR-PART MARKETING PLAN

Writing out a marketing plan can seem like a daunting task. But if you break it down into the component pieces you may find that it shows you a pathway forward that can be a powerful collaborative tool so that you can share it with staff, volunteers, board members, consultants and contractors to help them see where their part fits into the whole.

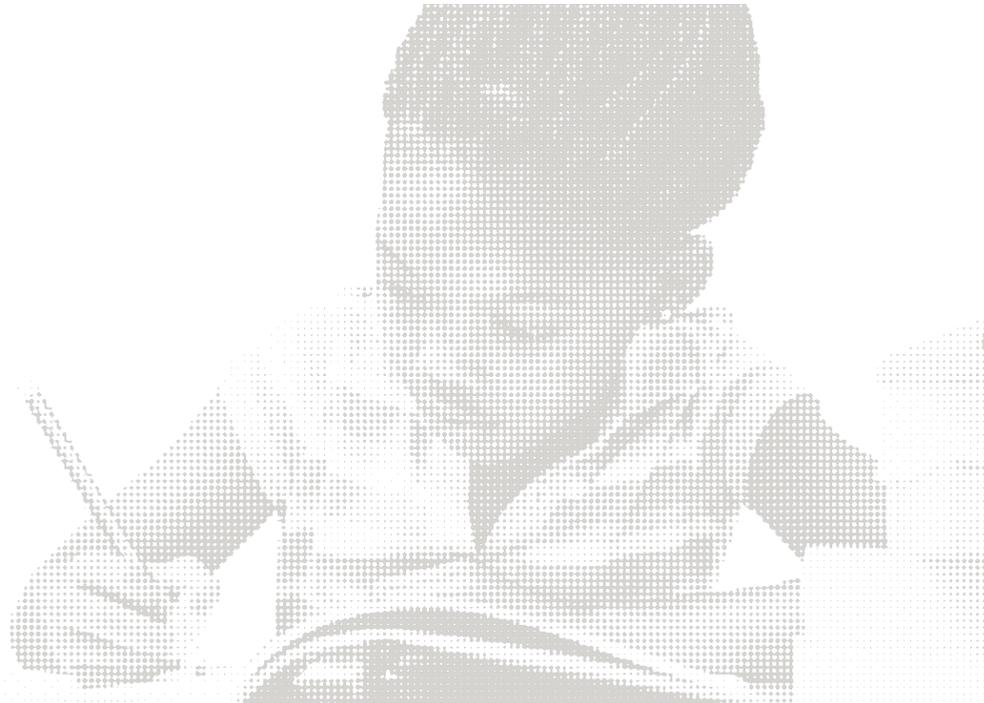
There are four basic parts of simple marketing plans. *Remember: A Marketing plan is not "let's use social media."* You can write your four-part plan in as much detail as you wish.

**1) Strategy, 2) Tactics, 3) Timeline, 4) Budget.**

We'll assume that you have the Brand Book done already, which should tell you who you are, who you want to be, how you'll communicate and what that sounds like.

## 1. STRATEGY

Audience - Segmentation · Goals · Sustainability · Financial viability



### **STRATEGY HAS GOTTEN A BAD RAP OVER TIME.**

*Rather than being a direction setting exercise it has too often morphed into a long-drawn-out process whereby you re-question your mission and vision and debate the esoterics. Make strategy here, some simple questions that you can answer easily.*

**1) Who is your audience by segment?** *Your school might be a K-6 school. Great you know those kids. Now think about the kinds of parents you're after. Who are the decision makers on kids' education. What ages are they? Where do they live? What distance can they or will they travel to attend your school?*

**2) What are your goals?** *Do you need all ages of kids in your first year? Do you only need to fill your kindergarten classes? Do you have needs for each grade level to fill in to account for attrition?*

**3) What aspects of sustainability can you analyze today which may help you into the future?** *For example, are you going to always be looking for the same students each year? Does your plan have you opening another grade or another building at a later time? Does your program change at some point? How do other schools and other plans in your area affect you? Are there school openings or closings or demographic trends that will force you to look at your strategy and sustainability with new perspective?*

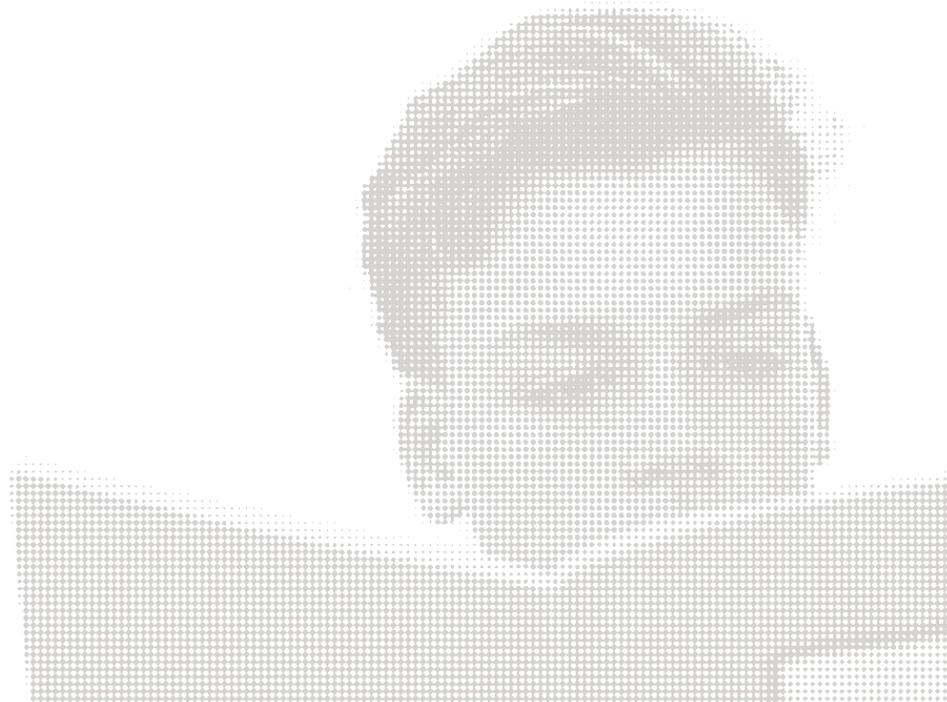
**4) Financial viability** *in the longer term is relevant to your strategy. Do you have plans on purchasing, leasing or changing facilities which impacts your strategy? What level of student body by grade does your school need to not only be viable today but prepare to be viable into the future?*

# FOUR-PART MARKETING PLAN (continued)

## 2. TACTICS

What are the activities that you will undertake and the collateral you need to create to achieve your goals? Many organizations come up with a list similar to what's on the facing page. Some of the best versions of this also include a goal attached to the Funnel designation so that they can see if they will meet their overall goals.

List out all the tactics that your budget (#4) will support AND that are likely to work with your target groups (from #1). The tactics can be as granular as is needed to get the work done. Generally speaking if you have limited experience you should have greater and greater detail so that you, your staff, your volunteers and others know exactly what you are doing. Note that your tactics are often also replicable and you should gather data, plan on analyzing results, modifying your activities, and capturing your learning into an annual playbook so that you can do an even better job next year. Many successful schools have annualized plans and calendars that repeat a certain cycle that fits with parent choice, district tools (where that is available) and normal cycles of attending and staffing your school.



### TACTICS

*Writing out ideas and deciding on your exact tactics is hard work. Most organizations attempt to take on too much and don't resource their choices appropriately. We suggest starting with a selection of activities, testing them, refining, narrowing, and betting on the winners over time. There is no single, "right way" to do marketing and build enrollment for your school because it depends on so many factors including the overall environment, the community, the ways that they find out about schools, decide on schools, and the number of options in the area.*

**1) What top three activities will you try?** *How will you measure your successes, how much will you invest, what part of the sales funnel are you targeting with each activity (awareness, inquiry, application, etc.). Remember that for a new school especially you will need to ensure that each component of the funnel is attended to. You must generate interest and capture leads. You must convert leads and you must help to create a commitment (i.e. a sale). Pay attention to the factors below because focusing exclusively on one item only (interest generation for example) will invariably cause you to fail.*

**2) Retention** *What tactics will you employ to ensure you keep as many students as you can?*

**3) What is your plan for how you manage the sales process?** *The sales process through email, phone, text, and in-person efforts is critical to your success. Document it here with the necessary detail to ensure that you succeed, the right understanding of expectations, budget, training, and measurements.*

# FOUR-PART MARKETING PLAN (continued)

**RETENTION:** Consider adding a section on “Retention and Communications” that details out all that you need to do to serve your families and your community in addition to what you need to do to attract new students.

Questions:

What do you do to keep your existing students/families?

What are your tools to do this? What are your resources (people, time, \$)?

What is your goal?

How do you collect data and measure/report on this?

Is there a program that you can run such as a referral or affinity program that will help you build up retention?

In what way can you use ambassadors to multiply your impact?

## SALES: Sales Flow and Plan

Understanding the idea of sales is important. Whether you call it the function of a registrar or sales, it doesn’t matter. But do understand that each email that comes in with a question is a function of relationship building and is a potential student. What is your process for handling and tracking emails? How will you follow up with them one day, one week, and one month later? Who follows up? How do you track their Inquiry into, Interest, into Application and into Enrollment? How are you purposeful in direct 1:1 communications and bulk communications (such as a newsletter)? We suggest charting out your most critical pathways for your most critical target audiences and ensuring that your process ensures that you are communicating to educate and motivate them to enroll in your school IF the fit is right for their student.

For example, your Sales Flow should adequately document what your expectations are for each potential student and family.

## Sample Action Table

Actions	Target	Funnel	Cost
<i>Responding to potential parent questions</i>	<i>Parents</i>	<i>Lead</i>	<i>Time</i>
<i>Three days later each email is followed up on to see if there are more questions.</i>	<i>Parents</i>	<i>Lead</i>	<i>Time</i>
<i>One week later an email is sent to see if the parent is ready to enroll? If not what other questions can be answered.</i>	<i>Parents</i>	<i>Lead</i>	<i>Time</i>
<i>One week later attempt to escalate them one more level up in their journey – if they are emailing, ask to talk to them on the phone. If they are on the phone ask if they would like to do a school visit. If they have visited see if they would like help filling out the application, etc.</i>	<i>Parents</i>	<i>Lead</i>	<i>Time</i>
<i>Parents/Students who have applied – make sure they get weekly touches to reinforce the sale and provide more information until they arrive at school.</i>	<i>Parents</i>	<i>Application</i>	<i>Time</i>
<i>Attendees – what cadence will you employ with students/families who are in your school. Do you send a weekly email from the Principal? Is it monthly? Is there a weekly teacher email? How are you keeping your families engaged in your school?</i>	<i>Parents</i>	<i>Attendees</i>	<i>For</i>

**EVENTS:** One subsection that you might consider detailing if this meets the needs of your target groups are events. They can be their own sub-section. Remember all the collateral that you will need to support your events.

# FOUR-PART MARKETING PLAN (continued)

Sample Action Table

Actions	Target	Funnel	Cost
<i>Emails</i>	<i>Parents</i>	<i>Apply</i>	<i>(\$1500 list build?)</i>
<i>Facebook boosted posts</i>	<i>Parents - moms, 28-45</i>	<i>Inquire</i>	<i>\$1500/mo</i>
<i>Events - School Fairs</i>	<i>Families</i>	<i>Inquire/Apply</i>	<i>\$2500</i>
<i>Direct Mail - Postcards</i>	<i>Parents</i>	<i>Inquire</i>	<i>\$5000</i>
<i>Door hangers - w/in 5mi</i>	<i>Parents</i>	<i>Inquire</i>	<i>\$2500</i>
<i>Yard Signs - w/in 5mi</i>	<i>Parents</i>	<i>Inquire</i>	<i>\$2500</i>
<i>TV ads</i>	<i>Families</i>	<i>Inquire</i>	<i>\$7500</i>
<i>Google Adwords</i>	<i>Parents - moms, 28-45</i>	<i>Apply/enroll</i>	<i>\$2500</i>
<i>Meet &amp; Greet at feeder schools</i>	<i>Students</i>	<i>Inquire/apply</i>	<i>\$500</i>
<i>Sponsorships at partner orgs (sports, etc.)</i>	<i>Students</i>	<i>Inquire</i>	<i>\$1000</i>
<i>SUMMARY</i>	<i>Covered them all</i>	<i>Hits all parts of funnel</i>	<i>\$30K-\$200 student / fits budget</i>

Sample Action-Step Timeline

What	Who	Deadline	On Schedule?	Approved
<i>Door hangers (DH)</i>	<i>PM</i>	<i>January 21, 2021</i>	<i>yes</i>	<i>x</i>
<i>DH- design</i>	<i>MDB</i>	<i>January 1, 2021</i>	<i>no</i>	<i>x</i>
<i>DH- print</i>	<i>Bob's Printing</i>	<i>January 15, 2021</i>	<i>no</i>	<i>x</i>
<i>DH- Distribution</i>	<i>TBD</i>	<i>January 21, 2021</i>	<i>no</i>	<i>x</i>
<i>Yard Sign (YS)- design</i>	<i>MDB</i>	<i>February 10, 2021</i>	<i>yes</i>	<i>TBD</i>
<i>YS - print</i>	<i>Bob's Printing</i>	<i>February 22, 2021</i>	<i>yes</i>	
<i>YS - distribute</i>	<i>PTO volunteers</i>	<i>March 1- 30, 2021</i>	<i>yes</i>	

### 3. TIMELINE

**Task timeline.** Putting together a simple table of all the activities within your marketing plan is not a bad idea. It supports being able to hand this effort off to volunteers, or staff and helps decrease items from slipping through the cracks which can affect your bottom line in the coming year.

# FOUR-PART MARKETING PLAN (continued)

**Editorial calendar:** Another tracking device for your school will be an editorial calendar in which you plan out the known communications that may be enrollment related, school related, internal, external or public. This supports any volunteers, staff, and others who may also be playing a role in your strategy and tactics.

## Sample Editorial Calendar

What	Target	Who	Date	On schedule?	Cost?
<i>Email - monthly</i>	<i>Enrollment</i>	<i>PM</i>	<i>March 1, 2021</i>	<i>yes</i>	<i>no</i>
<i>FB - post general</i>	<i>Inquiry</i>	<i>TT</i>	<i>March 3, 2021</i>	<i>yes</i>	<i>no</i>
<i>Twitter - post</i>	<i>Inquiry</i>	<i>TT</i>	<i>March 3, 2021</i>	<i>yes</i>	<i>no</i>
<i>Email to all inquiries</i>	<i>Application</i>	<i>PM</i>	<i>March 7, 2021</i>	<i>yes</i>	<i>no</i>
<i>Press Release - New campus</i>	<i>Interest</i>	<i>PM</i>	<i>March 10, 2021</i>	<i>yes</i>	<i>\$100, list cost</i>
<i>FB post - New campus</i>	<i>Interest</i>	<i>TT</i>	<i>March 10, 2021</i>	<i>yes</i>	<i>boost post \$100</i>
<i>Twitter post - New campus</i>	<i>Interest</i>	<i>TT</i>	<i>March 10, 2021</i>	<i>yes</i>	<i>no</i>
<i>Email to all current applicants</i>	<i>Enrollment</i>	<i>PM</i>	<i>March 15, 2021</i>	<i>no</i>	<i>no</i>

## 4. BUDGET AND RESOURCES

List out all the resources you have including:

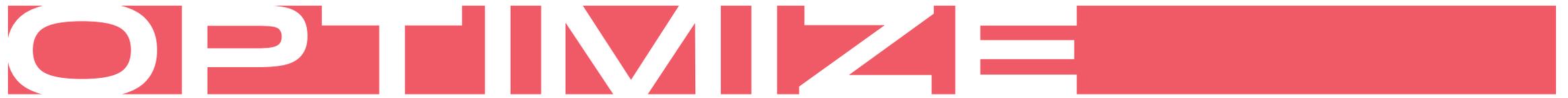
People, Volunteers, Locations, your Total budget. Create a separate table that takes your student goals and figures out the “Cost of acquisition.” Evaluate whether your budget is spread over the sales funnel appropriately.

Remember that a budget is a guide, a plan, and a tentative commitment. As you work through the items in your budget, assess the return you’re getting for the cost. Replace less valuable items with actions where you’re seeing a better return. This may be a month-to-month or a year-to-year assessment.

### **BUDGET**

*Your budget is what you expect to spend on your activities, but also includes non-expense items—your resources—such as staff, volunteers, in-kind efforts, and more.*

*Understand how much you are spending and to what effect. Attempt to use your resources on all parts of the enrollment process and not only on one.*



## YOUR MARKETING EFFORTS

Whether you are starting a new school or are several years into recruiting students, make sure you are fully leveraging the information available to you through your local district/authorizer, the Colorado Department of Education and the Colorado League of Charter Schools.

### Quality School Options:

Be sure you understand the School Performance Framework results (available on CDE Schoolview) and are familiar with the Colorado School Grades website to become acquainted with schools in the surrounding area.

### Student Projections:

District planning departments, especially larger districts, often have projections for how many school-age children are currently in the district and projected to be in the district into the future. Consider selecting a location for your school where there is high demand now and into the future. If your location is already set, ensure you are engaging with the district/authorizer to get access to all the data that they can/will share.

### Choice Trends:

A good indication of whether parents are seeking additional options is district and school choice-in and choice-out data. Districts often track this information carefully. You may consider selecting a location for your school where there are high concentrations of students “choicing-out” of their neighborhood school, or where there are students “waitlisted” to attend area schools.

### Student Contact Lists:

Requesting student lists from your district/authorizer to use to market your school to prospective families. This is especially useful at transition years (elementary to middle school or middle school to high school) to inform families, in the market for a new school about the option you offer. Not all districts will share students lists. But like with other parts of life, if you don't ask the answer is always no.

### Build a relationship:

The Colorado League of Charter Schools strongly encourages you to build a relationship with your local district. Building on your mutual desire to provide high-quality school options in your community, meet with the district (including their Communications Office) to find out how you can collaborate, how you can support them, and how they can support you. In some cases, the League may be able to make introductions for you. Contact us for support.



# MI=SSAIG=

## GENERAL CHARTER SCHOOL MESSAGES

Ensure that you can weave in some general messaging as you communicate about your school. Read more in this document about targeted marketing, but remember that this general message is important to ensure your parents and students understand the basics.

Some parents are specifically looking for a charter school, others might not know the difference between a public charter school and a traditional public school. One simple explanation is to state that your school is a tuition-free, public school that, as a charter school, has the flexibility to be more innovative while still being held accountable for student achievement.

While it is important to draw distinctions between charter schools and traditional schools, it is also important to articulate what they have in common.

All charter schools are public schools.

Charter schools are tuition-free.

There are no “test-in” requirements to attend charter schools.

Charter school students must take the state assessment tests.

Charter school teachers must be “highly qualified”.

Charter schools offer a variety of different curriculum models.

Charter schools serve a broad range of diverse students including low-income, racial and ethnic minorities and students with disabilities or other special needs.

For all of these reasons, charter schools are not comparable to private schools.

### UNIQUELY CHARTER

Charter schools are renowned for creating an environment in which parents can be more involved, teachers are given the freedom to innovate, and students are provided the structures they need to learn. Some additional messages of distinction might include how you promote how your school uniquely encourages:

Parent involvement

Teacher innovation

Student learning

Your specific model

Your own outcomes

Your own innovations in education

### USE THESE WORDS

*Accountability, Effective, Motivating, Challenging, Stimulating, Opportunities, Options*

### NOT THESE

*Competition, Experimentation, Reform, Autonomy*

Focus on the merits of your own school as opposed to the weaknesses of other schools. Attacks on other schools, or even a school district, generally turn parents off.

# GENERAL CHARTER SCHOOL MESSAGES

(continued)

## WHAT MATTERS TO PARENTS

### PERSONALIZATION

What this means for you:

Clearly articulate your school's "theme" and mission and how you meet the individual needs of each student.

### PERFORMANCE

What this means for you:

Be transparent about performance measures such as state assessment results, Colorado School Grades, high school graduation rates, and college application/acceptance. Have exemplars of student portfolios available to show what the data doesn't.

### SAFETY

What this means for you:

Promote the safe and inviting school environment you provide. Highlight discipline policies and records as well as the values or principles you instill in your students.

### PROXIMITY

What this means for you:

Focus on recruiting families who live or work near your school and make sure families are aware of transportation options (if available).

### THE RESEARCH

*What Schools Do Families Want (And Why)? A policy brief from Era New Orleans on school choice post-Katrina JAN 2015 By: Douglas N. Harris and Matthew F. Larsen*

*What Parents Want: Education Preferences and Trade-offs A National Survey of K-12 Parents AUG 2013 By: Thomas B. Fordham Institute Dara Zeehandelaar, Ph.D. and Amber M. Northern, Ph.D. Ch. 7 - Creating Savvy Choosers: Informing Families About School Choices (HFR '11) JAN 2012 By: Paul Teske*

Utah Charter School Study Prepared for the Utah State Legislature Executive Appropriations Committee NOV 2006 By: Andrea K. Rorrer, Ph.D., Charles Hausman, Ph.D. and Cori Groth, Ph.D.

## WHAT PARENTS WANT

Once their non-negotiables are satisfied, [parents] start looking for something special. In the end, it's not unlike people's view of cars. Pretty much everyone wants a vehicle that's reliable, safe, and affordable. But once those requisites are supplied, drivers and purchasers have dramatically different preferences as to roominess, sportiness, seating capacity, gas mileage, and, of course—pace Henry Ford—color and style.

- What Parents Want: Education Preferences and Trade-offs



# RETENTION

## RETAIN FAMILIES

Satisfaction is a rating, loyalty is a brand. An important way to assess your success is by the number of families who re-enroll every year. It is important to continue to work on your relationship with your families even after they are committed to your school.

Retain the families in your school by letting them know they are valued and asking them to stay.

- Thank families for choosing your school.

- Share the unique experiences that your school offers.

- Articulate the commitment you and your staff make every day to the school's students and their families.

### Prioritize parent communication

Parents have an everyday interest in what occurs in your school, and they make major decisions that can affect your school such as whether their child remains enrolled. You should be especially sensitive to their communication needs.

- Send teacher introduction letters and/or conduct home visits at the start of the year to outline expectations.

- Share the good news. When the school does well and when students do well, let parents know.

- Send a regular school newsletter to parents highlighting past and upcoming events. Feature a "Board Corner" to enhance professionalism.

- Encourage teachers to communicate regularly with parents; they may consider sending home content-relevant questions for parents to ask their children about what they are learning.

- Anticipate and provide information that parents want and need (e.g., grading policy, homework requirements, discipline policy, ways to contact their teacher).

- Include parents on your list of those to be nurtured and recognized.

- Send a satisfaction survey to parents at the end of the year to gather feedback on how to improve your school experience. Communicate the results.



# WARGHS

## GROW ENROLLMENT

### FOCUS ON TRANSITION YEARS

#### You are

An elementary school  
A middle school  
A high school

#### Target

Early childhood providers  
Elementary schools  
Middle schools

#### Action items:

Obtain student lists for schools within close geographic proximity in order to target your marketing. Target transition year teachers at nearby schools. Share information about your school and obtain information about their students. Invite them to experience your school during the school day. Invest time in cultivating and sustaining these relationships. Hold events for transition year students at their school and at your school. Provide opportunities for students and their families to visit and experience your school. Create a one-pager about your school using your “defined school experience”. Evaluate your web presence (see website tips); edit descriptions of your school to best reflect your school experience.

Mail/email recruitment letters to prospective students using lists provided by the district. Hold an open house for prospective families. Initiate a door-to-door effort. Considering paid advertisements? Local community newspapers and Home Owners’ Association newsletters are budget-friendly and have the best chance of reaching your intended audience.



# INTRODUCING

## USE AMBASSADORS

Ambassadors can be a tremendous asset in spreading the word about your school. They can significantly extend your marketing reach and impact.

### Who are your ambassadors?

Students	Volunteers
Parents & Parent Teacher Organization (PTO)	Board Members
Teachers	Student and Family Alumni
Staff	

### How you can use your ambassadors.

- As a reference for prospective students and their families.
- To lead school tours or share their experience during a school tour or open house.
- To provide positive testimonials of their experience.
- To serve as a liaison/buddy to new students and their families.
- To go door-to-door to promote your school.
- To host "meet-and-greets" in their homes for prospective families in the area.
- To address community groups such as Rotary, Chambers, Kiwanis to publicize the school, help recruit board members and create community ambassadors.



### Activate your ambassadors.

#### TEACH THEM TO CONNECT

Teach them the skills to be a good storyteller and presenter. Provide them with the messages you want them to communicate, but encourage them to make those messages their own.

#### GIVE THEM A PROJECT

Align their talents, skills, passion, and knowledge with opportunities. Give great public speakers a forum and those who are extremely personable, 1:1 opportunities.

#### LET THEM LEAD

Ask your ambassadors to create opportunities to promote your school and let them lead in organizing them.

## YOUR SALES FLOW

### Your Phone Process:

Sales through the phone, through virtual tours, through Zoom and through other means are vital.

### Goals:

- I want the phone to ring... .
- Who answers it, what do they say, what are you trying to get them to do, what is the next step in the funnel?
- What then?
- I want emails to come in, then what, what are you trying to do and what is the next step?
- I want people to show up to a tour (or a virtual tour), then what?
- This typically all funnels down to an intent to enroll.
- Then this funnels down to a commitment.
- First day student show up.
- Oct count day student in a seat...

# IMMATERIALS

## Consider investments in the following:

- Glossy one-sheet
- Brochure
- Signage (permanent and portable)
- Newsletter (hard copy and/or electronic)
- School mobile app
- Door hangers
- Direct mail piece
- Video

## Launch your marketing efforts by:

- Offering tours, conducting open houses, offering shadow days
- Participating in recruitment fairs
- Initiating a door-to-door recruitment effort
- Doing a direct mail, email, or phone campaign
- Enlisting the help of a marketing professional

## Dos and Don'ts

- Do be consistent by always using the same language to describe your school.
- Do use approved photos (signed release) of your students, teachers, and parents; ensure the photos reflect the diversity of your school and are of high-quality.
- Do feature testimonials from students, teachers, and parents.
- Do emphasize the safe environment your school provides.
- Don't use acronyms or education jargon.
- Don't make errors in grammar or spelling; have at least two people proofread all information to avoid errors.
- Don't embellish your program or school.
- Don't make disparaging remarks about other schools.
- Don't use poor quality photos.

## Tips that support your sales

### EVERY SCHOOL SHOULD HAVE

- An engaging website with fresh content promoting positive news and the school's value proposition
- High-quality photos and logo
- A kid-centric décor



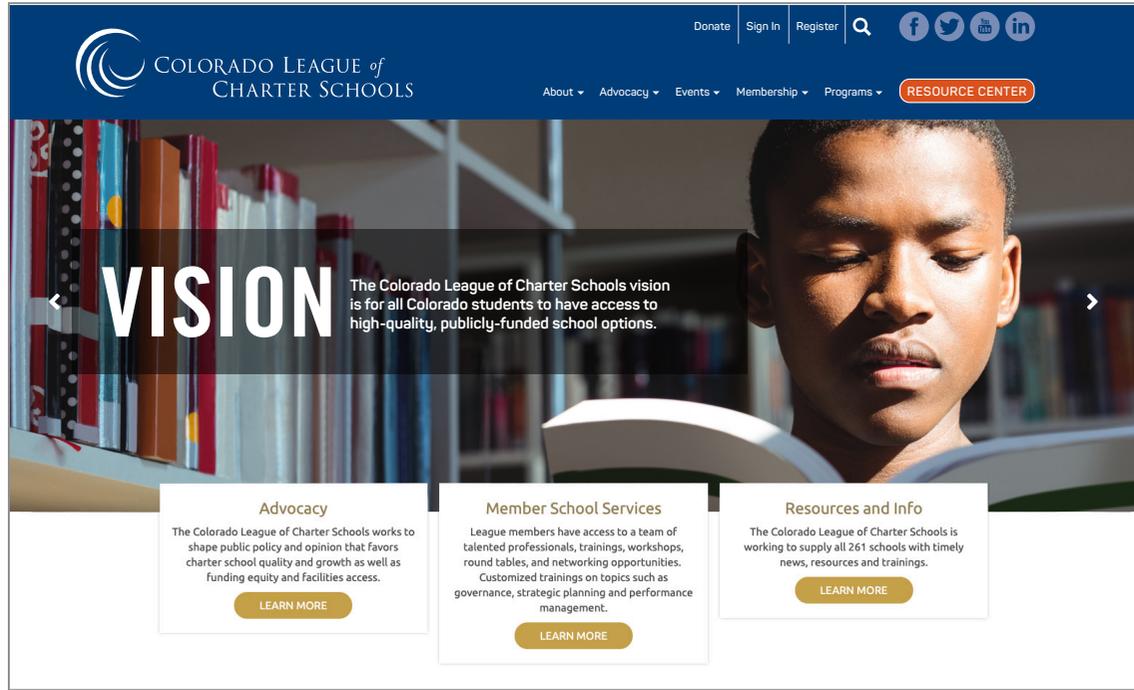
# W E B S I T E =

## GROWING INTEREST TO SUPPORT ENROLLMENT

Your website represents your school and is an integral component of your brand.

It should... Have a friendly, appealing design that includes happy students who reflect your student population.

It should not... Look neglected, obsolete, or disorganized.



The following are basic pages every school website should have:

### About Us

Describe the history, educational philosophy of the school, and grades served plus any affiliations, associations, accreditations, and awards the school may have received. Define what a charter school is; explicitly state that charter schools are tuition-free public schools. Include contact information for the main school office, a staff directory, and a map of your school's location.

### Enrollment Information

Include an enrollment form (click here to see an example) and describe the application process, deadlines, and any openings the school may currently have.

### Calendar of Events

Provide an up-to-date calendar of school-wide events and schedules for sports teams.

### Documents

Make frequently used documents like permission slips, the application for enrollment, student handbook, lunch order forms, etc., available online. Note: PDF format is usually the best format for these documents.

### Class Pages

Teachers should have a page for the class(es) they teach. These could be updated as often as weekly with news and homework assignments, or simply provide a link to the class syllabus.

### GOALS

School websites have two main functions:

They act as an online brochure for prospective students and parents; and

They can improve efficiency and effectiveness of communication between a school and its families.

## YOUR MARKETING EFFORTS

Whether you are starting a new school or are several years into recruiting students, make sure you are fully leveraging the information available to you through your local district/authorizer, the Colorado Department of Education and the Colorado League of Charter Schools.

### Quality School Options:

Be sure you understand the School Performance Framework results (available on CDE Schoolview) and are familiar with the Colorado School Grades website to become acquainted with schools in the surrounding area.

### Student Projections:

District planning departments, especially larger districts, often have projections for how many school-age children are currently in the district and projected to be in the district into the future. Consider selecting a location for your school where there is high demand now and into the future. If your location is already set, ensure you are engaging with the district/authorizer to get access to all the data that they can/will share.

### Choice Trends:

A good indication of whether parents are seeking additional options is district and school choice-in and choice-out data. Districts often track this information carefully. You may consider selecting a location for your school where there are high concentrations of students “choicing-out” of their neighborhood school, or where there are students “waitlisted” to attend area schools.

### Student Contact Lists:

Requesting student lists from your district/authorizer to use to market your school to prospective families. This is especially useful at transition years (elementary to middle school or middle school to high school) to inform families, in the market for a new school about the option you offer. Not all districts will share students lists. But like with other parts of life, if you don't ask the answer is always no.

### Build a relationship:

The Colorado League of Charter Schools strongly encourages you to build a relationship with your local district. Building on your mutual desire to provide high-quality school options in your community, meet with the district (including their Communications Office) to find out how you can collaborate, how you can support them, and how they can support you. In some cases, the League may be able to make introductions for you. Contact us for support.

TBD

Image from CO Dept. of Education



## SCHOOL EXPERIENCE WORKSHEET

In one sentence, how would you describe your school?

What is important to the people in your community?

Why do families choose to attend your school?

How do you meet the individual needs of your students?

What are two to three points of pride for your school?

What programs or services are unique to your school?

What are two words we want everyone to use to describe your school?

Write the ideal front page newspaper headline about your school:

### THE OVERVIEW

Write a one-paragraph description of your school based on the information on the left. Balance accurate with aspirational— aspirational may bring families to your school, but it won't keep them there.

### Once you have a description, ask yourself...

Does it feel right?

Are quick associations positive?

Does it tell a good story?

Will it resonate with your community?

Is it memorable?

Does it accurately reflect what you offer today?

