Keeping Up With Trends That Impact Your Market

NYSAIS Admission Retreat
April 2011

Presented by Jennifer Eidam Davis
SSATB Director of Outreach
Goals for Today

• Analyze Admission Trends
  – National, Regional and Local

• Discuss and Confer in Breakout Group Discussions
  – Issues will be addressed and reported

• Share Practical Takeaways
  – Discover concrete tools to maximize your effectiveness

• Review Resources
  – Explore admission-centered professional development opportunities
Admission Changing Landscape

A weakened economy

A fading demographic

Increased competition
A weakened economy

Private schools see more financial aid requests during recession - but applications hold steady

More parents request aid, pull kids from private schools
Income Distribution

www.mybudget360.com
Leveraging Financial Aid

Commitment to enhancing financial aid to make an independent education sustainable for current students and accessible/affordable to new students

Steps to get there as an institution and a community:

• Establish guidelines and policies
• Help educate families
• Understand Financial Aid doesn’t end with tuition
What Recession???

- Millionaire population in U.S. grew 8% last year fueled by stock market recovery
- 8.4 million households over $1 million (up from 7.8 million from last year)
- Households with $5 million and more also rose 8% last year
- Households with $500,000 rose by 6%
- Households with $100,000 grew slightly

Aaron Smith, CNNMoney.com, March 16, 2011
Proceed with Caution...

- Those with money are more cautious today than in 2007
- 2008, millionaire population plunged by 27%
- Attitudes are cautious
- Homeowners are less likely to believe their home is a stable asset
- 55% of households with less than $1 million net worth are still protecting their principal rather than take risks

Aaron Smith, CNNMoney.com, March 16, 2011
A fading (traditional) demographic

U.S. Population Shift Accelerates to South, West States, 2010 Census Shows

Census Bureau Estimates U.S. Population Continues Shift to South, West
Population Shifts

Percent of the Population, by Race and Hispanic Origin: 1990, 2000, 2025, and 2050
(Middle-series projections)

Source: U.S. Census Bureau, Population Division
Increased Competition
Education at home

Once considered just for Christian fundamentalists, homeschoolers today cite many different reasons for their home education choice.

- 48.9% Can give child better education at home.
- 38.4% Religious reasons.
- 25.6% Poor learning environment at school.
- 16.8% Family reasons.
- 15.1% To develop character and morality.
- 12.1% Object to what school teaches.
- 11.6% School doesn’t challenge child.
- 11.5% Other problems with available with school.
- 9% Student behavior problems at school.
- 8.2% Child has special needs or disability.

Source: U.S. Department of Education

ALLISON MARTIN/Assistant Design Editor
Charter Schools

Taken from a recent Stanford University study on charter school performance
wikipedia.com/school_voucher
Watch. Practice. Learn almost anything—for free.

What started out as Sal making a few algebra videos for his cousins has grown to over 2,100 videos and 100 self-paced exercises and assessments covering everything from arithmetic to physics, finance, and history.

Help us change education

Our small team is on a mission to deliver a world-class education to anyone, anywhere, and you can help. Take a second to get the word out, or read about how teachers, translators, donors, and everyone else can contribute.
Characteristics of Students who Do Well in Online Environment

- Independent Learner
- Effective Communication (written and oral)
- Self-motivation and discipline
- Time Management

Smith, Clark, Blomeyer; A synthesis of New research on K-12 Online Learning
REGIONAL TRENDS
NYC’s Top 5 Private School Admission Trends for 2010

• What recession? Not for New York City
• ERB Prep is the new norm
• New York City Public School Drama
  – Kindergarten admission no longer a given
  – Overcrowding
  – Budget cuts
• More structure, more skills, more learning at an earlier stage
• “Lap Year” grows in popularity

www.abacustomom.com
Recent Headlines

Private School: Is It Worth Your Money?

Public, Private, or Homeschool...Oh My!

It’s a Tough World: 3,100 Kindergartners Waitlisted in NYC

Thousands Wait-Listed for Kindergarten Classes

Babble.com, March 30, 2011
wnyc.com, March 30, 2011
Overcrowding NYC Schools

• In 2006, the total enrollment in the public schools was 1,042,078.
  – Approximately 37% of all students enrolled in the public schools in 2006/07 attended school in an overcrowded school building.
  – Pre-K programs have been slashed. Many districts no longer offer this bonus year.
    • Upper West Side (PS 9 is the most popular) Pre-K program received 538 applications for 36 spots.

• Affects the highest need students in the lowest performing schools

• Study suggests that Natural Decline in enrollment are not significant enough to make a difference

Maxed Out: New York City School Overcrowding Crisis
www.cfequity.org
Findings based on 2006-07 school year
### Top 10 New York State Counties By Average Family Income

<table>
<thead>
<tr>
<th>NAME</th>
<th>Average Family Income per County (Current)</th>
<th>Average Family Income per County (Predicted)</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany County</td>
<td>$94,557</td>
<td>$112,294</td>
<td>19%</td>
</tr>
<tr>
<td>Nassau County</td>
<td>$137,990</td>
<td>$157,582</td>
<td>14%</td>
</tr>
<tr>
<td>New York County</td>
<td>$156,551</td>
<td>$161,544</td>
<td>3%</td>
</tr>
<tr>
<td>Orange County</td>
<td>$92,320</td>
<td>$105,009</td>
<td>14%</td>
</tr>
<tr>
<td>Putnam County</td>
<td>$104,303</td>
<td>$82,741</td>
<td>-21%</td>
</tr>
<tr>
<td>Rockland County</td>
<td>$118,356</td>
<td>$130,324</td>
<td>10%</td>
</tr>
<tr>
<td>Saratoga County</td>
<td>$97,642</td>
<td>$114,328</td>
<td>17%</td>
</tr>
<tr>
<td>Schenectady County</td>
<td>$88,454</td>
<td>$101,356</td>
<td>15%</td>
</tr>
<tr>
<td>Suffolk County</td>
<td>$120,393</td>
<td>$137,644</td>
<td>14%</td>
</tr>
<tr>
<td>Westchester County</td>
<td>$148,635</td>
<td>$147,010</td>
<td>-1%</td>
</tr>
</tbody>
</table>
# Top 10 New York Counties

By Average Family income with school-age children

<table>
<thead>
<tr>
<th>NAME</th>
<th>Ages 5 to 14 (Current)</th>
<th>Ages 5 to 14 (Predicted)</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albany County</td>
<td>33,001</td>
<td>31,523</td>
<td>-4%</td>
</tr>
<tr>
<td>Nassau County</td>
<td>158,295</td>
<td>127,458</td>
<td>-19%</td>
</tr>
<tr>
<td>New York County</td>
<td>148,672</td>
<td>175,375</td>
<td>18%</td>
</tr>
<tr>
<td>Orange County</td>
<td>53,641</td>
<td>51,058</td>
<td>-5%</td>
</tr>
<tr>
<td>Putnam County</td>
<td>12,334</td>
<td>9,734</td>
<td>-21%</td>
</tr>
<tr>
<td>Rockland County</td>
<td>43,387</td>
<td>42,962</td>
<td>-1%</td>
</tr>
<tr>
<td>Saratoga County</td>
<td>26,077</td>
<td>24,878</td>
<td>-5%</td>
</tr>
<tr>
<td>Schenectady County</td>
<td>18,312</td>
<td>17,786</td>
<td>-3%</td>
</tr>
<tr>
<td>Suffolk County</td>
<td>188,598</td>
<td>162,068</td>
<td>-14%</td>
</tr>
<tr>
<td>Westchester County</td>
<td>126,072</td>
<td>117,653</td>
<td>-7%</td>
</tr>
</tbody>
</table>
Top 10 NY Counties by Highest Average Family Income
Private Schools Increase by 10% in NYC

- Article sites possible economic recovery
- ERB rep states 2011 might surpass 2007 banner year
- Baby Boom: Children age 3 to 6 rose 48% between 1990-2008
- Manhattan families are staying in the city

www.online.wsj.com
Wall Street Journal, March 5, 2011
New Competition in the City
NYC Charter School Growth

www.nycharterschools.org
Quick Facts on Your Competition

- In 1999: 4 Charter Schools in NYC
- In 2010-2011: 125 Charter Schools in NYC
- 55,000 applicants for 11,700 seats
- 17 new charter schools will open for 2011-2012

Sources: NYC Charter School Center survey, NYC Dept. of Education data
Common Online Application for 20 NYC Charter Schools

Parents can now apply to 20 charter schools in NYC through a single common application! Click here to visit the application and find out more about the 20 participating schools.

Applying Online to New York City charter schools.
Online, Standard Applications Soar

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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1295</td>
<td>3994</td>
<td>8922</td>
<td>15,020</td>
</tr>
</tbody>
</table>

- Apps are Up! Way Up! 60% more applications than last year
- 82% of member schools accept the SSAT Application
- 311 schools received at least one application in 2010-2011
- The number of schools receiving 100 application or more doubled in 2010-2011
- 30 schools utilize the optional one page supplement
  - up from 18 in 2009-2010
  - Up from 10 in 2008-09

- 6 schools around the country and in Canada are exclusive SAO users

- A regional approach... (ISSL) Independent School of St. Louis use SAO as their only regional application

- Cost for member schools to use the SSATB application service -- $0
LOCAL (NYSAIS) TRENDS
And The Survey Says...
Please indicate your school's location.

- Greater New York City: 76%
- Other: 24%
What is your school type?

- Boarding/Day: 15%
- Day: 85%
Please describe this year’s total enrollment number as of April 4, 2011.

- Below Target
- On Target
- Above Target

34% Below Target
34% On Target
31% Above Target
How can students apply to your school?

- Only my school's paper application: 45
- Only my school's on-line application: 4
- Via both my school's paper and on-line application: 51
How do you notify applicants of your admission decisions?

- On-line (email or student account access) ONLY: 45%
- Both On-line (email or student account access) and U.S. Postal Service: 30%
- U.S. Postal Service Only: 21%
- Other, please specify: 4%
Please rank order the following reasons why a student might decline an offer of admission to your school – with 1 being the most common reason and 3 being the least common reason.

- Chose a public option
  - 1: 46%
  - 2: 30%
  - 3: 24%

- Financial aid not sufficient
  - 1: 43%
  - 2: 31%
  - 3: 25%

- Accepted an offer at another independent school
  - 1: 51%
  - 2: 27%
  - 3: 22%
<table>
<thead>
<tr>
<th></th>
<th>Down &gt; 15%</th>
<th>Down 11-15%</th>
<th>Down 6-10%</th>
<th>Down 1-5%</th>
<th>No Change</th>
<th>Up 1-5%</th>
<th>Up 6-10%</th>
<th>Up 11-15%</th>
<th>Up &gt;15%</th>
<th>N/A</th>
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</thead>
<tbody>
<tr>
<td>Inquiries</td>
<td>3%</td>
<td>1%</td>
<td>4%</td>
<td>6%</td>
<td>24%</td>
<td>18%</td>
<td>18%</td>
<td>3%</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Applications</td>
<td>2%</td>
<td>4%</td>
<td>6%</td>
<td>7%</td>
<td>16%</td>
<td>20%</td>
<td>20%</td>
<td>6%</td>
<td>15%</td>
<td>4%</td>
</tr>
<tr>
<td>Visits/Interviews</td>
<td>1%</td>
<td>1%</td>
<td>4%</td>
<td>9%</td>
<td>14%</td>
<td>20%</td>
<td>23%</td>
<td>8%</td>
<td>13%</td>
<td>7%</td>
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<tr>
<td>Accepts</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>18%</td>
<td>29%</td>
<td>23%</td>
<td>7%</td>
<td>2%</td>
<td>6%</td>
<td>3%</td>
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<tr>
<td>Denies</td>
<td>2%</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
<td>37%</td>
<td>19%</td>
<td>12%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Wait Listed</td>
<td>3%</td>
<td>0%</td>
<td>4%</td>
<td>3%</td>
<td>31%</td>
<td>18%</td>
<td>16%</td>
<td>4%</td>
<td>9%</td>
<td>19%</td>
</tr>
<tr>
<td>Financial Aid: New Students</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>5%</td>
<td>25%</td>
<td>22%</td>
<td>16%</td>
<td>9%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Financial Aid: Returning Students</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>18%</td>
<td>33%</td>
<td>16%</td>
<td>7%</td>
<td>5%</td>
<td>18%</td>
</tr>
<tr>
<td>International Applications</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>24%</td>
<td>12%</td>
<td>9%</td>
<td>5%</td>
<td>15%</td>
<td>33%</td>
</tr>
<tr>
<td>Merit Awards</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>22%</td>
<td>8%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>70%</td>
</tr>
<tr>
<td>Enrollment</td>
<td>0%</td>
<td>3%</td>
<td>5%</td>
<td>12%</td>
<td>25%</td>
<td>31%</td>
<td>13%</td>
<td>1%</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>
10 College Admission Trends

1. 2011 Was Toughest Year to Get into College-Ever
2. College Applicants Are More Interested in Southern Schools
3. International Student Applications Are Surging
4. Ivy League Graduate School is the New Goal
5. Applicants From Technology Havens Have the Admission Edge
6. The Waitlist is Huge
7. More Applicants Are Interested in Creative Writing
8. Homeschoolers Are on the Rise
9. More Californians Are Applying Out of State
10. Public Schools are Accepting More Out-of-State Students

Written by Kristina Dell, editor at Newsweek.com
News.yahoo.com, March 30, 2011
A Quiz

• In 1950, what percentage of applicants were admitted at Harvard?
  92%

• In 2011, what percentage of applicants were admitted at Harvard?
  6%
International Students

• Asia is PRIMARY market

• China, India and South Korea and higher education

• 27% of SAO applications were from China with vast majority applying to boarding schools

• >15% for 15% of NYSAIS schools
Breakout Sessions

Table Time
Financial Aid

Retention and Attrition

Competition with Public, Charter, Magnet

Staffing to support technology and social media strategies

Feast or Famine