



Opening Day Admission Report

September 11, 2018

Enrollment

We opened the 2018-2019 school year with an enrollment of **476 students**, 404 returning students and 72 new students (including 17 siblings and 6 faculty/staff children).

2018-2019 Enrollment, grade-by-grade

Preschool:	72
Transitional K:	13
Kindergarten:	48
Grade 1:	43
Grade 2:	43
Grade 3:	41
Grade 4:	45
Grade 5:	41
Grade 6:	46
Grade 7:	43
Grade 8:	41

Demographics

Of the 476 students:

- 241 are boys (50.6%); 235 are girls (49.4%)
- 131 students are receiving sliding scale tuition (28%).
- 7% are from LGBTQ-headed households
- 47% are students of color
- 29.4% of our students are multiracial, a demographic that continues to increase each year

Attrition

Although we exceeded our enrollment goal, in part this was because attrition was **unusually low at 5.4%**.

The families of 23 students chose not to return to CDS:

- 10 students moved
- 5 students transferred to public school
- 7 students transferred to another independent school (including 3 to immersion programs)
- 1 student transferred to a faith-based school

Attrition of 5.4% is the lowest we have experienced since the admission office began tracking attrition rates in the 2002-2003 school year. This chart shows annual attrition from the present back to the 2002-2003 school year:

2017-2018	5.4%
2016-2017	8.3%
2015-2016	8.3%
2014-2015	7.9%
2013-2014	9.1%
2012-2013	8.8%
2011-2012	9.4%
2010-2011	12%
2009-2010	9%
2018-2019	7%
2007-2008	6%
2006-2007	16%
2005-2006	8%
2004-2005	11%
2003-2004	16%
2002-2003	33%

Had we experienced attrition this past year comparable to that of the last two years (8.3%), it is possible we would not have met our enrollment goal of 470.

We have no way of knowing whether the low attrition we experienced this year is the beginning of a trend toward lower attrition rates for CDS, or whether this was an unusual year (perhaps fueled by a strong economy) and we will revert back to our typical attrition in subsequent years.

In addition to the uncertainty about future attrition, CDS (as well as the majority of our competitors) is seeing declining yields in our K-8 program as competition for students continues to increase.

To the admission office, these two factors caution us to be very conservative when making enrollment projections. Missing the enrollment goal by even a few students can have a meaningful impact on the budget. Alternatively, pressure to increase enrollment to get closer to a budgeted number could translate into the need to accept students who in other situations we would not consider to be qualified candidates for our program (which carries its own set of issues).

Yield

Our Early Childhood Program (preschool and TK) yield was very strong at 70%, and was higher than our yield for 2017-2018 (64%).

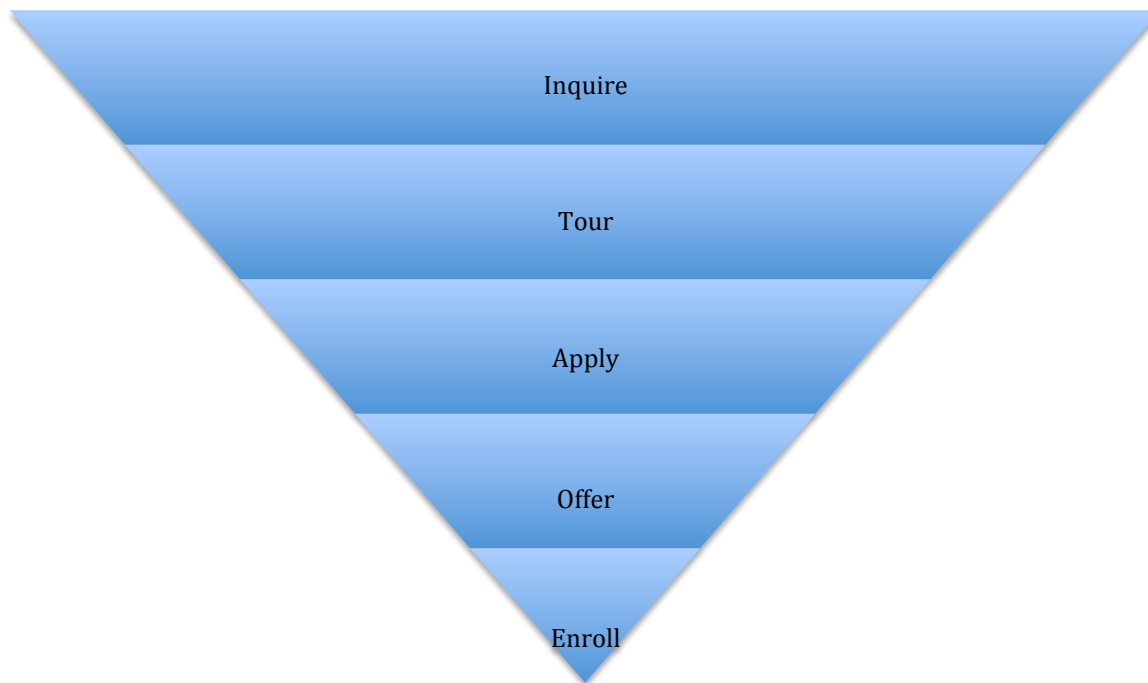
However, our K-8 yield, at 36%, was lower than our yield for 2017-2018, which was 44%. Our peer schools are likewise reporting a lower yield in their K-8 programs. (One school, that adds only a small number of children at kindergarten, reported a first round kindergarten yield of 0).

There was no one reason mentioned by families when they declined an enrollment offer from CDS. Some of the reasons cited this year included:

- Having a strong public school option.
- Location – being accepted at a school closer to home.
- Financial – choosing an independent or faith based school that was less expensive than CDS, or choosing (free) public school for financial reasons.
- For independent schools, wanting an immersion program (families choosing CAIS, FAIS, Lycee, or Presidio Knolls), wanting a single-sex environment (families choosing one of the all-boy or all-girl schools), seeking the “Quaker experience” (for Friends), or liking the facility/program more (for Live Oak).
- Uncertainty around the Head of School transition.
- A first for me, one family declined our enrollment offer because they felt CDS was “too academic.”
- Also a first for me, one family declined our enrollment offer because of “the shooting incident that took place near CDS last summer...we cannot ignore the ‘what if’ given the recent gun violence issues.” (This family chose a school in Presidio Heights.)

The Admission “Funnel”

Traditionally, the admission process has been seen as a “funnel,” as depicted below:



Using the admission funnel model, for the 2018-2019 school year:

We received **Inquiries** from the parents of **682 children**.

We **Toured** the parents of **519 children**.
(76% of parents Inquiring went to the next step of Touring.)

We received **Applications** from the parents of **326 children**.
(63% of parents Touring went to the next step of Applying.)

We extended **Enrollment Offers** to the parents of **139 children**.
(43% of applicants received an enrollment offer.)

We **Enrolled** a total of **72 children (the “yield”)**.
(52% of enrollment offers were accepted, a solid school wide yield, overall, although this number was bolstered by the very high yield in the Early Childhood Program.)

Successes

- We exceeded our enrollment goal.
- The number of applications received (326) was essentially comparable to last year (330). We had more than plenty of applicants to fill our classes with families we wanted at our main entry points (preschool, kindergarten, and sixth grade).
- **58%** of the children in the 3-year-old preschool class are students of color. There are also 5 students from LGBTQ-headed households in the 3-year-old preschool class.
- This past year, we focused on retention efforts for families moving from the Early Childhood Program to kindergarten. The families of 8 rising kindergartners opted not to continue in our kindergarten program for 2018-2019. Last year, the families of 16 rising kindergartners opted not to return.
- Although we typically don't see a lot of attrition between fourth and fifth grades, this year we also did some retention events for this group, in part to give rising fifth grade families a better sense of the middle school program.
- 45% of newly enrolled students have at least one parent who works in some capacity in the **technology** industry (both a success and a challenge as we think about who we are as a school).

Challenges

- Even with over \$3 million in sliding scale funds, we do not have enough funding to reach the 30-33% level of students on sliding scale that over the years has been discussed as a desirable level (we currently are at 28% (rounding up) of students on sliding scale). With the accelerating cost of tuition, the admission office feels that we are slowly creeping toward having 25% of students on sliding scale. Even at that level we will still be a leader in socioeconomic diversity, but it is a long way from 30-33%.
- Because we always are coming up short with sliding scale funds, we have chosen to allocate most of our sliding scale funds to the K-8 program. This means that, for the 2018-2019 school year, only **18%** of the Early Childhood Program students are receiving sliding scale tuition. Nonetheless, we easily filled the Early Childhood Program with families we want.
- We remain the most expensive Early Childhood Program in San Francisco (although La Scuola, at \$32,200, is very close; preschool tuition at San Francisco School, our main pre-8 competitor, is \$30,650).
- Competition for students of color is fierce.
- The cost and scarcity of housing continues to impact families. 10 students enrolled last year did not return because their families moved out of San Francisco. Families moving out of San Francisco accounted for **43%** of our attrition.

Admission for the 2019-2020 School Year

- We began taking tour reservations August 16. As of September 11, we had received 173 inquiries, a 12% increase over this time last year.
- Our online tour and open house sign up forms, launched three years ago, continue to be highly successful (used by virtually all prospective parents/guardians). Our online sign ups for preschool family visits, kindergarten student visits, and kindergarten

parent/guardian interviews also are used by virtually all prospective parents/guardians. These technologies have significantly increased efficiency.

- We are continuing to work on our admission materials to creatively distinguish ourselves from our competitors. In response to feedback from both current and prospective parents/guardians, we are expanding the short printed pieces (that detailed our educational philosophy, the frameworks that shape our program, and our core academic curriculum) to include information about our specialist classes. These materials will be complete by the start of our season on October 1.
- The flash drive that we used over the past several years as part of our admission materials is now outmoded technology. In its place, we are creating a password-protected website, experience.cds-sf.org, with exclusive content available only to parents/guardians who have toured CDS. Once a family tours, we will send an email with the password and a link to the website. Once the website is up and running (by the start of our season), I will share the password so that you can check it out. Many thanks to Rico Tan, IT Director, Daven Gee, Technology Integrationist, and Alyce Ide, Technology Support Specialist, for their help in creating this mobile-friendly website as well as its video content.
- We are continuing to work with the communications department to assist us in developing an inbound marketing plan.

An Eleven-Year Snapshot of Admission at CDS

We have posted on the board portal an eleven-year snapshot of admission statistics for CDS, from the 2008-2009 school year to the present school year. Even with some outlier numbers, the statistics paint a fairly stable picture of key admission data points, including inquiries, tours, applications, and overall yield. A few items to notice:

- Although the total number of applications remains fairly stable, the distribution of applications by grade level has changed.
- Applications to the Early Childhood Program have declined in the last four years in comparison with prior years. We still have plenty of applications to fill our Early Childhood Program with students and families we want, but the decrease in the number of applicants is significant: the average number of Early Childhood Program applicants for the past 4 years – even accounting for the larger pool in 2016-2017 – is 25% less than the average for the prior 4 years. There is no way to say with certainty what factors contributed to this decrease. It could reflect a declining population of children (as of 2017 only 4.5% of San Francisco’s population was under age 5, according to U.S. Census Bureau statistics). It could be a reflection of low birth rates that may change in coming years. It also could be that the high cost of our preschool is suppressing some interest in our program.
- Applications to our kindergarten program have been fairly consistently at around 100 for a number of years now (we typically add 12-15 new kindergarten students).
- Applications to sixth grade have increased significantly over the last five years in comparison with prior years. We have few spots in sixth grade (we added 7 new students for a class size of 46 for 2018-2019, and would like to try to keep the 2019-2020 sixth grade at 44, so will add 3, assuming no attrition), so this

increased pool doesn't benefit the school from an enrollment numbers perspective (although it does give us more/stronger candidates to choose from).

The San Francisco Admission Landscape

After admission season, the Bay Area Directors of Admission (BADA) organization partnered with The Enrollment Management Association to conduct the second annual survey of the admission landscape in the San Francisco Bay Area. 65 BADA-member independent schools (preschool-8 and K-8), including CDS, completed the survey. Here are some key results as of May, 2018:

The Applicant Pool

- 90% of schools with preschools received 150 applications or less for preschool (CDS received 116, not including TK)
- 89% of schools received 150 applications or less for kindergarten (CDS received 98)

Yield

- 44% of schools reported yields of 60% or less (CDS' school wide yield was 52%)

Enrollment

- **80% of schools reported having 1 or more spaces available** (with eight schools reporting 26-50 spaces available). Only 20% of schools characterized themselves as full.
- 53% of schools (including CDS) only email admission decisions. 45% of schools both email and mail admission decisions. Only 2% of schools send admission decisions exclusively by mail.

Students of Color

- **40% of schools reported enrollment of students of color as greater than 45%** (for 2018-2019, students of color enrolled at CDS comprise **47%** of the student population)
- 26% of schools reported enrollment of students of color between 31% and 45%
- 9% of schools reported enrollment of students of color between 16% and 30%
- 25% of schools reported enrollment of students of color between 1% and 15%

Attrition

- 62% of schools reported attrition for the 2016-2017 school year of 6% or greater, with 11% of schools reporting attrition of more than 15% (our attrition for 2016-2017 was 8.3%)

Social Media

- 78% of schools use one or more social media platforms for recruitment and retention of students
- Of the schools using social media for recruitment/retention, 93% use Facebook, 71% use Instagram and 53% use Twitter
- CDS has an Instagram account that the communications office posts to frequently; we also have Facebook and Twitter accounts that are used less often. So far, these accounts have been focused on current families; admission has not used them for recruitment of prospective families.

Sliding Scale Tuition

In past years, we have talked about our desire not to become a “barbell” school, i.e., having only full pay families on one end and high financial need families on the other end. The hope is to have a distribution of families across the socioeconomic spectrum.

I wanted to share some statistics from this past admission season to illustrate how challenging this is.

We received 92 sliding scale applications from prospective (non-current) families. Of those 92 applications:

19 were from families who did not qualify for sliding scale tuition. By way of example, one family offered to pay \$20,000 in tuition, but the sliding scale calculation showed the family could pay \$117,575. One family offered to pay \$22,000, but the calculation showed the family could pay \$67,691. Families who apply for sliding scale tuition, but do not qualify, usually do not accept an enrollment offer if made (this year, we made seven offers to such families, and only two accepted). Although these families can afford full tuition, their perception is that they cannot.

41 were from families who could pay 10% or less of tuition. We made six offers to families who fell in this category, and all of them were accepted.

9 were from families who could pay more than 10% but no more than 25% of tuition. We made two offers to families who fell in this category, and one was accepted.

10 were from families who could pay more than 25% but no more than 50% of tuition. We did not make any offers to families who fell in this category.

8 were from families who could pay more than 50% but not more than 75% of tuition. We made three offers to families who fell in this category, and one was accepted.

5 were from families who could pay more than 75% of tuition but less than full tuition. We made two offers to families who fell in this category, and both were accepted.

As the above numbers show, the largest groups of applicants for sliding scale were either:

- Very-high need (paying 10% or less of tuition) or high need (paying no more than 25% of tuition); or
- Families who do not qualify for sliding scale

(in other words, the “barbell”)

These groups totaled 69 of our 92 sliding scale applicants, or 75% of the sliding scale pool. The “middle” groups (paying somewhere above 25% tuition but less than full tuition) were a total of 23 children.

For the very-high and high need families, we offered enrollment to 16% of those families (8 families), and 7 of the 8 accepted.

For the “middle” groups, we offered enrollment to 22% of those families (5 families), and 3 of the 5 accepted.

Given how few families fall in the “middle” groups, enrolling families across the full economic spectrum is challenging. In addition, the sliding scale component is one small part of the admission process. While we do our best to have a wide economic range of families, we prioritize (1) offering to those students who we feel can be successful in our program; and (2) offering to those families with whom we feel we can positively partner. If these two priorities are not met, we will not extend an enrollment offer to a family, even if the family would add to socioeconomic diversity in the “middle” groups.