

Creating an Annual Report for Your School

Introduction

Writing an annual report for your school can help you in many ways by:

- Communicating your significant accomplishments during the past year
- Establishing credibility
- Educating community leaders and influential decision makers about what's going on in your school
- Recognizing the heart of your school: volunteers and donors
- Telling your story

Using a creative layout for your annual report is a great way to make your report more interesting. Including a special theme and/or timeline showing your accomplishments over the school year is another great way to draw the reader's attention.

Please explain your financials in layman terms – not everyone is familiar with reading financial reports. Include an abbreviated balance sheet in your report that summarizes your major categories of income and expenses. Take it a step further and use graphs and pie charts. Finally, explain your financial situation, on both the income and expense sides. Please make your report reader-friendly and make no assumptions about your reader's comprehension level of interpreting financial information.

Basics of an Annual Report

If you have never published an annual report before, the thought of doing so can feel overwhelming. Many people simply do not know where to begin. As a good rule of thumb, your annual report should always begin with your key message and achievements. Ask yourself two questions:

- What three things are you most proud of from your school last year?
- If you had only two minutes to tell someone about last year's accomplishments, what would you emphasize about your school?

The answers to the questions above are the building blocks for your annual report.

The Principal's and/or Pastor's Message

The Principal's message, which is the letter at the front of the annual report, is the hardest part of an annual report to write. You can think of your principal's letter as the executive summary of your annual report. The message should make an emotional connection with the readers by reminding them of the outstanding accomplishments that are taking place at your school. Use the principal's letter to set the tone or theme for what you are sharing in the rest of the report. Your principal's message should be about five paragraphs in size. It includes your overall focus of the previous year and emphasis on the current or upcoming year. Each paragraph should be about 4-5 sentences and each sentence should include no more than 16 words (if possible). The total length of the letter is approximately 600 words.

Annual reports summarize what has already occurred. It is fine to talk about the present or the future in the principal's message but don't write your annual report as if it were a summary of your current situation.

The purpose of an annual report is to highlight your school's accomplishments as a whole, not the work of any one particular faculty member or student. Always look for creative ways to recognize the contributions of your entire faculty.

Financial Information

When people read annual reports, they expect to find several sections, including the school's vision, mission statement, a description of recent accomplishments, and a list of administrators and donors. They also expect to see information on the school's finances. Some schools choose to print their full financial statements in their annual reports, while others print only a few simple pie charts. What you share and how you share it are really up to you.

If your financial statements show a deficit, you need to explain why your school is losing money. This case demands a narrative explanation, regardless of what other charts or graphs you may include in the financial section of your report. Be brief, but honest and explain why you spent more money than you brought in and describe the steps you are taking to remedy the problem.

When designing charts and graphs keep in mind that the purpose is to help readers understand your information quickly in a friendly manner. Keep your visuals simple! Try to limit the number of data elements (i.e. pie slices) to five. Use easy-to-read fonts that are the same size than the body text of your annual report.

Donor Listings

Every annual report includes lists of donors, administrators and volunteers in the final pages. To keep the donor list to a reasonable length many schools set a minimum dollar amount for inclusion in the annual report (smaller donors can be recognized in other ways). You can alphabetize your donor list or group the donors according to the level of contribution and alphabetize within those groups.

If you have donors who wish to remain anonymous, you can list “Anonymous” as the first entry in the list or you can include a short statement at the beginning or end of the list thanking all the donors who wish to remain anonymous. Always list the school administrators and the various boards and volunteer groups that make up your school.

Final Thoughts

Collecting annual reports for schools and corporations that you admire is a great investment of your time. Creating such a file/folder for your school helps you stay fresh with design and messaging ideas. Use the attributes you like from these reports and incorporate the ideas into your own unique report that creatively highlights the accomplishments of your school.

Creating Effective Publications

Introduction

Often, the first contact a prospective parent or student has with a school – if it isn't a person – is through one of the publications circulated by the school. Sometimes it is an informal flyer, poster or book cover. Sometimes it is a more formal piece such as a brochure, profile or newsletter. In all cases, your publications should reflect both the image you wish to project, and the quality by which you would like to be characterized. In preparing any school publication, it is always valuable to review the work of other schools. You may do so by contacting schools directly.

Creating Effective Publications Supporting Documents

Notes and outlines, which will help you to create effective publications. They include:

- Notes on Creating Effective Publications (Outline)
- Creating Effective Publications – Process
- Creating Effective Publications – Products
 - Brochures
 - School Profile
 - Newsletter
 - Photography

Application

The focus of these materials is three-fold. First, they can be used to stimulate discussion both individually and in a Marketing Committee setting. Second, the materials guide you through a process and help you to develop a plan of action. Third, the materials may also be used as a checklist to be sure your plan is practical.

Notes for Creating Effective Publications

General Observations

- USE A PROFESSIONAL; but don't necessarily hire one.
- "Less is more." Don't try to over-write or over-illustrate.
- Is it "focused?" Don't try to serve too many audiences/functions.
- Is it "user-friendly?" Clear, concise, interesting?
- Allow enough time to revise and negotiate; you are working with people who are just as committed as you are.
- Do publications reflect the mission and desired image of the school?

Concept

- End use -- Who will use it? How will it be used?
- Logo
- Image, theme and treatment (i.e. How do you want to characterize your school?)

Writing Copy (Text)

What you say may not only invite contact, it can also become a self-fulfilling prophecy for current users.

- Be succinct; quickly establish goals, priorities, highlights.
- Establish uniqueness and quality (position statements).
- Speak to audience interests/motivations (benefit statements).
- Identify quotes and testimonials, if appropriate.
- Select style and length of copy; some options:
 - Paragraphs/blocks of print
 - Intro/bullet points/conclusion
 - Use action words/call to action
- Include invitation--What should they do?
 - Mood, connotative language
- WRITE -- SEEK REACTION -- RE-WRITE
 - Keep treatment and theme in mind.
 - What will be seen/read first? Last?
 - What do you want the reader to know/do?

Process for Creating Effective Publications

Elements of Design

The process for creating an effective publication is based on strong leadership, a clear vision, effective planning, and cooperative efforts. The following simple outline gives a broad overview of the various stages involved in the process.

Phase I -- Pre-Planning Stage

1. Leader (Principal or other appointed person) establishes priority, solicits input, defines task, sets parameters, selects committee

Phase II -- Planning Stage -- Full Committee

1. Define goals, audience(s), message, end use
2. Identify resources -- human, technical, financial
 - a. Survey resources available in school/parish community
3. Establish budget
 - a. Issues: paper, color(s), number, illustrations, professional support?
4. Establish time line
 - a. What is target date for use?
 - b. Develop time line backwards. Allow two weeks for printing
5. Establish approval and revision process.

Phase III -- Preliminary Stages -- Sub-Committee of Phase II

1. Research: interviews, motivations, perceptions, etc.
2. Solicit quotes and testimonials
3. Decide creative approach -- logo, theme, concept
4. Develop outline
5. Rough draft & layout
6. Establish distribution and follow-up policies

Phase IV -- Production -- professional involvement

1. Finalize copy, illustrations and photos, layout
2. Create camera-ready art
3. Print
4. Distribution

Phase V -- If periodical (e.g., Newsletter, Profile) repeat Phases II - IV

Creating Effective Publications--Products

Marketing Brochure

- Geared to elicit contact from recruitment audiences
- Should be focused tightly and include a specific invitation
- Develop a distribution policy and follow-up process
- Should not be confused with a “Viewbook” or a development campaign brochure
- Usually a 3 to 4 year life span (Update Profile and Fact Sheets each year.)
- Currently, the use of black & white photography and 2- or 3- color design is very popular

School Profile

- Overview of facts and figures, updated frequently
- Think about including “Fact Sheets” for topics such as History Highlights, Mission/Vision/Philosophy Statements, Faculty Profile, Testing/Grading, Technology, Library/Research, Service Activities, Alumni/Parent Testimonials, College/Attendance Patterns, Athletics/Extracurriculars, Testimonials, etc.
- A school profile should be updated at least once a year. The goal is to provide current information, which cannot be presented in a previously prepared format such as a brochure or video. In preparing a profile, ask yourself what kinds of questions a prospective parent, donor or volunteer might ask about the school. A thorough school profile would include most of the following information:
 - School name, address, telephone number
 - Name of Principal and Pastor(s)
 - Parish(es) and/or neighborhood(s) from which it draws
 - Date school founded
 - Association with any parish and/or religious order
 - Basic admissions policies, tuition and tuition aid information
 - Religion/Liturgy/Sacramental Program
 - Statistical data
 - Structure (i.e., “Pre-K through 8th grade, etc.)
 - Enrollment figures
 - Description of faculty (size, degrees, religions/lay certification)
 - Pupil/teacher ratio
 - Average class size
 - Per pupil cost
 - Library volumes

- Number of computers
- Numbers and types of laboratories
- Testing programs and scores
- Programs and activities
- Academic programs
- AP, Honors, Gifted, Remedial Programs
- Field trips and enrichment programs
- Clubs and organizations
- Athletic activities and associations
- High schools or colleges attended by graduates
- Graduation rates
- Scholarships granted
- Transportation information
- Middle States Accreditation and other accreditations and memberships

Newsletter(s)

- Can be paper-based or electronic. If electronic, consider using Constant Contact (see [Tools to Support Your School Marketing Program](#) section.)
- One or more a year
- Geared to specific audience(s) over very broad appeal. For example, you may use an electronic newsletter for communicating to your school parents about school-related activities. And, you may want to develop a quarterly paper-based newsletter for alumni, donors and foundations.
- Possibilities: Parents, Faculty, Alumni, Parish, Community, etc.
- Create “flag” and “masthead”
- Be consistent; use recurring columns
- Think in terms of “30-3-30” concept (i.e. something for the reader who spends 30 minutes, the reader who spends 3 minutes, and the one who skims for 30 seconds)

Ten Tips for Better Newsletters

One of the most dramatic effects of the desktop publishing revolution has been the ease with which newsletters can be developed. As a result, we’ve seen an enormous increase in the number of newsletters being printed by a broad range of firms including: medical practices, law firms, and businesses. Newsletters can provide information as well as providing you with a directed marketing tool to position yourself in a market.

Now that there is such a great proliferation of newsletters, many people find themselves overwhelmed by a variety of homespun or stock newsletters. With so much competition for

attention, it's important that newsletters be done well in order to have a positive effect. Below are some pointers that we've learned over the years of producing newsletters to help you prepare them more effectively.

- **Keep It Simple**

Newsletters can often be a burden if they are not planned well. The first rule of effective newsletters is to think small. Divide the newsletter into a number of departments so that each "chunk" of the newsletter is a manageable size and can be undertaken relatively easily by someone in your office. Two or three hundred words per article are generally sufficient for most articles.

- **Develop a Format**

Using a professional designer can help you develop a professional looking and easy-to-use format for your newsletter. Whether you use the designer for the preparation of all your issues or just the initial format design, the use of a designer will immeasurably improve both the appearance and the readability of your publication. Seek out a volunteer with desktop publishing experience.

- **Use Pictures Whenever Possible**

Newsletters packed to the gills with words are overwhelming to readers. Having the text broken up by photographs or drawings not only makes the newsletter easier to put together, but also draws the reader in. The way people read is generally not from beginning to end, but in layers. They look at the pictures, then the captions and call outs. If those are interesting, they read the copy. Pictures don't have to be professionally taken, although in some cases, they will add a lot to the overall appearance of the newsletter. If you're good with a 35mm camera or even a Polaroid, small pictures will print very well. The bigger the picture, the better the photograph should be.

- **Vary the "Weight" of the Articles**

Not all articles should be dense or heavy. There should be a few departments, such as a profile column about people in your firm or a question and answer section, that provide lighter reading and help support some of your longer articles.

- **Make it Attractive**

- **Use Type That's Large Enough For People to Read**

Sometimes people are so determined to cram a lot of information into four pages that they make the type ten point or smaller. Although some typefaces are readable at ten point, generally speaking, eleven or twelve point are the preferred sizes for newsletters. The larger type sizes make the newsletters more readable and memorable.

- **Use Call Outs**

These are important parts of an article that are printed larger and in some cases a different color to help them stand out. It's a way for the reader to capture the essence of your article without having to read it. It also draws them into the article.

- **Focus on Audience(s)**

- **Develop Columns**

- **Proofread Carefully**

Nothing is more frustrating than getting your newsletter printed and finding a typo in the first paragraph. Sometimes you become so used to reading the drafts that you miss errors over and over. A simple technique is to read through the newsletter two or three times looking for different things each time--once for misspellings, once for usage, and once for punctuation. This will enable you to focus on one thing at a time.

By using some of these pointers, your newsletter can be more effective and will increase the probability that they will be kept. Sample newsletters from Diocese of Metuchen schools have been included at the end of this section for your review.

Tips for Photography: News Photos and Publications

TIP 1—Selecting a Photographer

1. When producing a high quality publication, allocate funds to hire a professional photographer to take your photographs. If you do not have the funds to pay for a professional, try to enlist a professional to volunteer their time and makes sure you give them credit in your publication. Many amateurs also take quality photographs, but be sure to see their work before asking them to help.
2. For photos to be submitted to the media, you do not need to hire a professional, but be sure the person taking the photographs is someone who consistently takes good photos and not just grabs shots.

TIP 2--The Camera

1. Today, almost everyone owns a digital camera and serious photographers have a digital SLR (Single Lens Reflex) camera. As long as the camera takes photos of at least three megapixels, the photographs should be good. Some cameras can take 12 megapixel photos. The more megapixels a photo is the more the photo can be enlarged and still be sharp. A photo only has to be 72 dpi for use on the Internet. Photos taken with cell phones should be avoided.

TIP 3--The Film

1. If you are using film, try Kodak Tri-X Pan, 400 ASA for black & white shots.
2. For color shots, try Fugicolor Super HR 400 (400 ASA). For color, turn off indoor fluorescent lights.
3. Both of these films are fast, versatile and can be processed quickly. Check the manuals or specifications for exposure settings.

TIP 4--The Shot

1. Is it a “people,” an “event” or “facilities” shot? (Hint: Shoot people at the event or in the facilities.)
2. Except for special cases, **avoid using a “crowd” shot** (6-7+). The closer the better; **think close-ups** and details.
3. **Avoid “line-ups,”** staged or static shots whenever possible, especially for publications.
4. **Make sure everything is in focus**, preferably against a contrasting background, except, of course, for “art” shots.
5. If outdoors, **make sure the sun is behind you.**
6. Always **take more than one** shot; somebody blinked. Ideally, you might use one shot out of every 10 to 20 you shoot.
7. Make sure to **ID your subjects**, especially for news photos and also for releases and record keeping.
8. Always **keep a camera at hand and ready**; you never want to miss that perfect shot which just happens.
9. Make sure a publicity release form is signed by the parents/guardians of the children who are in your pictures (**Note:** When using pictures, make sure you use the Diocese of Metuchen’s Office of Schools’ photography release form.)
10. **USE A PROFESSIONAL.**



The Office of Schools Marketing Committee

Sample Communications Project Worksheet (For Printed Materials)

Before beginning work on any communication or public relations project, complete this worksheet individually or in committee.

Publication: _____

Date: _____

Chairperson: _____

Phone(s): (H): _____ (W): _____ (C): _____ Email

Address: _____

1. Who is your audience? _____
2. What is your goal? _____
3. Format (e.g. flyer; brochure, etc.) _____
4. How will it be distributed? _____
5. Quantity? _____
6. Budget? _____
7. Copywriting/Editing? _____
8. Photography: (supplied, stock, original)? _____
9. Should it be compatible with an existing or new project? _____
10. Specific Considerations (e.g. dimension; paper; number of pages) _____
11. Delivery Date? _____
12. Delivery location? _____

Notes: _____



The Office of Schools Marketing Committee

Sample Diocese of Metuchen School Newsletters

Insert Documents Here

Advancement

There are a number of points where Marketing/Enrollment practices and Advancement practices intersect, and many marketing techniques are employed in a comprehensive advancement program to communicate your organization's mission, vision and message to your identified constituents. One key intersection is at the very outset of a school's relationship with a new family and their child(ren) during the enrollment process.

Advancement relies on establishing relationships and building upon them by communicating and engaging people in your school's mission and vision, for the purpose of securing charitable contributions in support of the school's mission. So at the very start of a new relationship with a family, systems should be in place to capture and share information critical to your Advancement Office's efforts.

To best begin, establish policies and guidelines governing data sharing between your Admissions and Advancement efforts. Decide up front what you need to share and how you intend to share it. Some schools may have software systems capable of exchanging information; others may need to share source documents. Then determine what information you need to capture. Some types of information critical to the Advancement process include:

- Alumni and Parent Employment Information
- Grandparent Information
- Relationships between Constituents and Organizations
- Election of Tuition Plans by Parents
- Tuition Payers (Grandparents/Trust Accounts)
- Student Clubs & Activities
- Student Financial Aid Information
- Student Scholarship Information
- Auto Registrations for Parking Permits
- School Sponsored Foreign Trips for Students
- Admissions of Accepted and Not Accepted Students (and students accepted but did not enroll)
- Volunteered Social Security Numbers
- Dates of Birth
- Other Affinities: High Schools, Colleges, Country Clubs, Charities

Refer to the sample New Student Data form for more information.

Identify the individual or individuals in your school who will be responsible for collecting and distributing the information gathered. If you need to rely on volunteers for all or part of this process, you must have a system in place to select appropriate candidates who must agree to and sign a confidentiality statement (see sample Confidentiality Agreement).



The Office of Schools Marketing Committee

It is crucial to your school's Advancement effort to have timely updates of all critical information, such as changes of address, moves, graduations, etc., so you will also want to build into the system a means to update all established data on your students, alumni, and family members.

Advancement is all about sharing your school's mission and building relationships with all of your constituents – and to get this right you must communicate, communicate, communicate. Remember, the purpose of Advancement is to “advance” constituents from loyal believers in your mission to active supporters of it. To be effective at this, your internal communications must be as thorough and professional as your external communications.



The Office of Schools Marketing Committee

Sample Confidentiality Agreement

St. Patrick School Confidentiality Agreement

Database Management Volunteer Job Description - Attached

CONFIDENTIALITY AGREEMENT:

In connection with the performance of your duties as a database management volunteer, you will have access to private and confidential information about St. Patrick School faculty, staff, families, students, donors and/or prospects, including, but not limited to the personal information which St. Patrick School has collected, identified, organized and stored within St. Patrick School’s databases and paper files (“confidential information”). All such information is the exclusive property of St. Patrick School. Confidential information may not be accessed, copied or used for any purpose other than in the performance of your duties, and may not in any manner be provided to any party outside of St. Patrick School. You may not disclose, share or discuss confidential information with any person or persons other than those specified by the Pastor, Name, or Principal, Name.

I will not utilize any such confidential information for my own benefit, nor the benefit of any outside party. I agree that this Confidentiality Agreement is reasonably necessary for the protection of the interests of St. Patrick School.

I have read, understand and agree to accept and abide by the above Confidentiality Agreement.

(Signature)

(Date)

WITNESS:

(Pastor’s Signature)

(Date)

(Principal’s Signature)

(Date)


Bishop Feehan High School

2009-10 New Student Data Form

Please fill out both sides and return completed form with other registration materials.

STUDENT INFORMATION

Full name: _____ Nickname: _____
First Middle Last

Date of birth: ____/____/____ Social Security #: _____

Mailing address: _____
Street City State Zip

Physical address: _____
(If different from above) Street City State Zip

Home Phone: _____ Student E-mail: _____

PARENT / LEGAL GUARDIAN INFORMATION

Parents married; student resides with parents. Student resides with legal guardian other
 Parents are divorced or separated.

Student resides primarily with Mother _____
 Father _____
Name, relationship to student

FIRST PARENT or GUARDIAN:

Father Mother Legal guardian

Full name: _____ Nickname: _____
First Middle Last

Maiden name: _____ Is parent a Feehan alumnus/a? ____ If yes, class year ____

Mailing address: _____
(If different from student's) Street City State Zip

Physical address: _____
(If different from student's) Street City State Zip

Phone: _____ E-mail: _____

Cell phone: _____ Fax: _____

Company name: _____ Title: _____

Address: _____
Street City State Zip

The National Advancement Summer Institute for Catholic Schools

Recruitment & Retention—Activities & Supporting Documents

Introduction

Recruitment and retention of students is at the heart of a school marketing and publicity initiative. An optimum sized enrollment provides the ability to build a solid educational program and the flexibility to be innovative.

The following section offers suggestions collected from various sources for activities related to recruitment and retention. No matter what the activity, however, there is a strong consensus that they are most valuable if implemented through a plan, and characterized by the following insights.

- A. Good recruitment doesn't happen by accident or good luck; it is the result of a simple but well-designed plan, which includes goals, calendars, and responsibilities, in addition to recruitment activities.
- B. While the principal can be the catalyst, and must be actively involved in providing oversight for the initiative, the principal should not be the primary recruiter. A good recruitment program relies heavily on volunteers – faculty and staff, parents and students, alumni, etc. The role of the principal is to provide leadership, direction and support to the volunteer efforts.
- C. A good recruitment program relies heavily on personal contact. Visits to the school are at the heart of effective recruitment. Brochures, cards, notes, invitations, phone calls – as well as contact between current parents and students and prospective ones – are also strongly encouraged.
- D. In order to be effective, recruitment must be year-round, with face-to-face contact, visits and activities for recruitment occurring throughout the school year (and even in the summer), not just during Catholic Schools Week.
- E. In order to be effective in recruiting, schools – including students, administrators, faculty, staff and parents – must form welcoming and caring communities. Further, the welcoming spirit and sense of caring must be immediately obvious to visitors. (For example, does the sign for visitors on your front door begin with “Welcome” or with “All visitors must...”). The greatest “magnet” for a school is a collection of faculty, students and parents who are enthusiastic, smiling, and committed to the school.
- F. A good recruitment program begins early. Parish members should be drawn into the school community as soon as their child is baptized. High schools need to make contact and provide services to their feeder school students as early as fourth and fifth grade.

- G. Retention relies on satisfied students and parents. Make a conscious attempt to survey satisfaction, to modify programs and activities where appropriate, and to involve current students and parents as thoroughly as possible in the life of the school. It behooves both elementary schools and high schools to join together early and work together effectively to encourage students to continue in the Catholic schools.

Administrators, teachers, parents and volunteers -- those actually working in recruitment and retention, have provided most of the ideas and suggestions included in this section. They have been shown to be effective when utilized as part of an overall plan by enthusiastic volunteers who believe in Catholic education and the mission of their local school.

Recruiting & Retention Activities

1. “Suggested Strategies”

Application: This is a list of strategies and tactics used for outreach to feeder schools, especially through parents and families. Implementing one or more of them can greatly aid your recruitment plan.

2. “Visits to Your School” (including “Special Events for Visitors”)

Application: Use this as a “checklist” of possible events and activities that enrich the educational program as well as provide an interesting experience for visitors. These types of events show that your school can be innovative and exciting.

3. Open House Materials

- a. “11 Tips for Creating an Effective Open House”
- b. “Open House – Planning Considerations”
- c. “Effective Open House – A Plan”

Application: This section will assist you in planning for effective Open House activities. While the open house should no longer serve as the primary recruiting device, it can be an effective means for exposing the school to large numbers of prospective families at the same time. As the materials indicate, the open house should never happen in isolation. It is preceded by contact and planning and followed by further personal contact. Frequent evaluation helps keep open house activities fresh and effective.

4. Suggestions for Activities

- a. “Sure-Fire Activities You Can Implement Tomorrow”
- b. “Important Steps in a Retention Program”

c. “Five Recommendations for Better Retention”

Application: These lists of possible activities provide a selection of initiatives, which have been successful in the “real world.” Choose from among them as you build your own action plans. They enable you to select activities, which have been tested and found to be effective.

5. What Makes a Good Information Packet?

Application: This information helps you develop the right message for your school information packets.

6. Suggested Summertime Activities

Application: These activities are suggested as a means of maintaining contact and commitment over the summer months. Some are aimed at newly registered families, and others are appropriate as retention activities for current students.

7. Sample Recruiting & Retention Forms

- a. A model of a basic, yearlong, recruitment plan for St. Patrick School.
- b. Sample Telephone Recruiting Script
- c. Sample Open House Evaluation Forms – Student and Parent
- d. Sample Catholic Schools Week Planning Grid

Application: These forms and templates will help organize the process as you develop a yearly plan and budget for your public relations, marketing and communications activities.

Recruitment & Retention of Students

Suggested Strategies for Outreach to Feeder Schools, Parents and Parishes

- Social gatherings at the homes of parents, to which prospective parents are invited.
- Social gatherings at your school, to which current parents are invited and asked to bring a friend.
- Individual or group lunches for feeder school principals, followed by a tour of your school. This can be especially helpful for new principals.
- Individual or group lunches for pastors and associates.
- Reception and/or dinner for feeder school faculties or pastors and associates. (Information about your school should be presented in a forthright, professional manner. It is helpful to have faculty present for informal encounters with your guests.)
- Letters written from current students to their former principals, teachers or pastors.
- Informal student or parent contact with former schools or parishes.
- Holiday greeting cards to feeder schools or parishes.
- Information packets or brochures mailed to feeder school principals, key faculty members, and pastors.

Visits to Your School

- Parents and students want to see your school. Make a school day invitation part of your recruitment literature.
- Mail invitation to your feeder schools.
- Faculty must adapt to these visits. “Be prepared.”
- Have a pre-planned tour.
- Ask for a one or two day notice before the visit.
- Be prepared for “visiting students” attending some classes.
- Be selective of your choice of “visiting classes,” and related faculty.
- Use students as your tour guides.
- Include special events for student and parent visitors. (Include lunch or refreshments).

Special Events Tailored for Visitors

Catholic Schools Week events:

- Performing Arts:
- Plays

- Dances
- Concerts
- Films
- Liturgies
- Religious or holiday celebrations
- Lectures and workshops
- Sports clinics
- Math or writing clinics
- Computer clinics
- Public speaking contests
- Debates
- Spelling, Language and Math Bees
- Latin, Greek or foreign language days
- Art or Science fairs
- Student demonstrations or classroom presentations

Remember---a successful visit is dependent on the effort expended on planning. Planning is your key to success!

11 Tips for Creating an Effective Open House

1. The Open House is not just “a necessary evil;” it is an opportunity. It is worth the work and time spent and deserves more than perfunctory efforts.
2. What you find interesting will probably interest most people. What bores you will probably bore most people.
3. Have a clear purpose and goal in mind. Develop a theme to support it. The larger the number of purposes and goals, the more work and support will be necessary for success.
4. Encourage word of mouth support and one-on-one invitations.
5. Use the students in as many ways as possible, especially as greeters.
6. Create pairs to support each other. Use students rather than parents/faculty whenever/wherever possible.
7. Publicity: Just because you said it once doesn’t mean it was heard.
8. Schedule as many hands-on activities as possible for all guests; computers, athletics, art, quizzes, etc.
9. Provide childcare if/when appropriate.
10. Keep each individual activity short, especially general sessions.
11. Develop/create effective supporting tools and materials:
 - a. Invitations and announcements
 - b. News releases
 - c. Bulletin and newsletter announcements
 - d. Maps of school and activities (especially to fit the theme)

- e. Brochures, profiles, flyers, handbooks, policy statements, lists, student/parent support statements, etc.
- f. Video/audio presentations
- g. Photo displays/picture taking
- h. Evaluation forms
- i. Others

Open House Planning Considerations

- Mail invitations to everyone on your mailing list
- Display ads and press releases in the Catholic, local and major papers, along with notices to feeder schools, parish bulletins and, possibly; radio and TV stations public-service announcements
- Reminder phone calls---student to student---to those on your mailing list
- Specific instructions to student assistants
- Possible formats and activities:
 - An informal format with visitors traveling through your school with a map.
 - A formal format with organized tours and student guides.
 - A formal session with speakers, possibly the principal, students, parents and alumni/ae. Consider an A/V presentation.
 - A combination of school tours with a formal speaker session.
 - Registration and the filling out of a brief information card or questionnaire.
 - Handouts, brochures or special publications.
 - Department or classroom presentations.
 - Sports and club demonstrations or displays.
 - Displays of yearbooks, school newspapers, literary magazines.
 - Informal encounters with administration, faculty, students, parents and alumni/ae (refreshments).
- Follow-up:
 - Letter or brochures to students
 - Letter or brochures to parents
 - Letter or postcards to students' relatives of alumni/ae, or to the alums themselves
 - Holiday cards to students
 - Scholarship or financial aid information
 - Thank you notes for attending
 - Invitations to subsequent student events

Plan for an Effective Open House

A. Purpose

1. Affirmation/retention

2. Information/PR
3. Celebration
4. Recruitment
5. Thank-you
6. All of the above
7. Other

B. Scheduling

1. What time(s) of year?
2. Other events associated?
3. Day, evening, weekend, multiple?
4. Create committee with calendars and agendas

C. Timeline

1. When will invitations go out? How?
2. Who will send/receive them?
3. Publicity: What kind? How soon? How often?
4. Scheduling of school and outside resources
5. Work backward from target date

D. Some Committee Responsibilities

1. Establish theme and purpose
2. Solicit faculty
3. Solicit parents' organization
4. Solicit students
5. Invitations
6. Plan schedule
7. Solicit presenters/presentations/prizes/activities
8. Notify and update parish(es), pastors, maintenance staff
9. Evaluate effectiveness

E. Faculty Responsibilities

1. Keep informed of date, theme, timeline, and responsibilities
2. Support student participation
3. Organize appropriate activities
4. Presence and enthusiasm

F. Student Responsibilities

1. Volunteer Support
2. Presentations and activities as appropriate
3. Presence and enthusiasm

G. Parent/School Advisory Committee/HSA Responsibilities

1. Keep informed about arrangements
2. Volunteer support
3. Presence and enthusiasm
4. Willingness to interact with guests
5. Support student and faculty activities

H. Agenda

1. Greeting: Students? Parents? Faculty?
2. General session? General welcome? General activity?
3. Tour(s)
4. Special presentations/activities/performances
5. Classroom activities
6. Social time/interaction/prizes
7. Shoot photos/videos of everything

I. Activities

1. Auditorium/All purpose room
 - a. General session/welcome
 - b. Directions/explanations
 - c. Video/performance/activities
2. Physical Education Area
 - a. Sports/P.E. demonstration
 - b. Hands on activities
 - c. Display of equipment, trophies, banners, etc.
3. Cafeteria
 - a. Refreshments
 - b. Student/parent interaction with guests
 - c. Student/parent volunteers
4. Classroom
 - a. Displays of student work
 - b. Student/teacher demonstrations
 - c. Videos
 - d. Hands on activities
5. Hallways
 - a. Displays of student work/artwork developing theme
 - b. Information on school and programs (e.g., aid, transportation, uniforms, special programs, etc.)
 - c. Administration, faculty, students, parents available for interaction
 - d. Guest book

J. Evaluation and Follow-up

1. Faculty, student, parent, guest assessment
2. Follow-up letters/calls to visitors
3. Thank-you notes to EVERYONE (Who writes them?)
4. Follow-up display
5. Create contact sheet/ mailing list

“Sure-Fire” Activities You Can Implement Tomorrow

Parent Partners: Create a list of current and former parents who can welcome prospective parents. They answer questions, invite prospects to join them for meetings, conferences and activities, and provide an objective contact point with the schools. Include their names and phone numbers in your recruitment materials, in case a prospective parent wants to speak to a current parent. Provide good information and materials, and train them well.

Real Estate Reception: (particularly good idea for a high school) Sponsor a reception for all the realtors in your area because one of the first questions realtors are asked by their clients are in reference to the quality of the schools in the area. Provide a short general presentation, packets of materials, and light refreshments. This works particularly well if offered as a joint activity by a group of schools (e.g., a high school can play host for the realtors and provide display space for all of its feeder schools).

Teacher Bio’s: Include teacher “bio’s” or “fact sheets” in your recruitment materials. Include education/certification, awards, outside interests and community involvement. Let people know how well qualified your teachers are (and motivate the teachers to work on strengthening their bio’s).

Holiday Art: Around each major holiday, approach local supermarkets to provide paper bags. Use the bags for an art project with students; let them draw and color them with holiday themes. Make sure students put your school name on the bags they work on and provide a short holiday message. Return the completed bags to the supermarkets for distribution to customers.

Ecumenical Efforts: First, be sure to have a policy in place for students who are not Catholic. Then, make contact with local churches that are not Catholic. Let them know their children would be welcome in your school. Provide materials and offer to come and talk with the church members. Works particularly well if your parish and clergy have other joint projects in place, or belong to a ministerial consortium.

Progressive Time Capsule: At the end of each school year, have the students create a “time capsule.” Carry the capsule on with the students through each succeeding year. Upon graduation, students will have years of memories to share. Open the capsule at their 5th or 10th reunion as an alumni activity.

The Personal Note: At the end of the school year, have teachers write short personal notes to each student they will have in class the following year. Greet them and tell them (and parents, of course) some of the things to look forward to in the coming school year. Follow up in the middle of August with an individual “welcome note” explaining how glad you are to welcome the student back.

Important Steps in a Retention Program

- Assess your retention situation:
 - School’s past record on retention
 - Determine attraction factors
 - Identify steps to change or enhance retention
- Identify why students leave:
 - Academic
 - Disciplinary
 - Personal
 - Financial
- Identify and provide the necessary counter-measures for these conditions. Motivate an attitude of “service” to students:
 - Official tone of faculty and staff
 - Changes in programs, services, and facilities
- Improve student transition into your school:
 - Support services
 - Sense of identification and belonging
 - Provide adequate counseling and advising:
 - Provided from very beginning
 - Human crises = personal counseling
 - Committed, competent advisors
 - Sense of belonging
 - Develop a set of successive rights and privileges to give something to “Look forward to:”
 - School Play/Musical
 - Student Government

Create a caring, responsive environment.

Five Recommendations for Better Retention

While most recommendations for effective recruitment also apply to effective retention practices, there are some issues and recommendations that apply specifically to our ability to retain students once they have chosen a Catholic school.

For example, statistical data tells us that the largest losses occur after the 5th/6th grade and after the 8th grade; but there are also losses at other grades as well. Since it costs significantly more to recruit a new student than it does to retain a current one, effective retention practices are both good education and good stewardship.

Some Recommendations:

1. Develop a retention “mind set.” What has changed since a family’s original decision that has led to the decision to transfer?
 - a. Knowledge—information—is power. Both entrance interviews (i.e. “What are your goals for your child?” “What are your expectations of the school?”) and exit interviews (i.e. “Why are you leaving?” “Can we do anything to change your mind?” “Could we have done something better?”) provide essential information for retention.
 - b. Do the real reasons for leaving indicate a failure on the part of the school to meet its mission, its philosophy, its goals and objectives?
2. Investigate the possibility of using the strongest teachers and support personnel in the areas of highest attrition, since they may be some the areas of highest need.
3. Try to involve the parents and the entire family as thoroughly as possible in the school program. Give them simple but engaging tasks to perform. Welcome them and invite them as frequently as possible. Encourage students to invite family members to the school regularly. This is especially desirable if you can identify “high risk” families.
4. Consider structuring activities, privileges, and responsibilities on a progressive basis in order to give extra incentive to remain. This is particularly appropriate for students of middle school age.
5. Remain as flexible as possible in order to respond to changing needs. It is the vision, mission, philosophy, and goals of the school, which tend to remain constant, not an individual program element.

What Makes a Good Information Packet?

Developing the Right Message

“AIDA” - A Blueprint for Executing Your Message

People respond to a promotional message by thinking, feeling and doing – and they do this in a specific sequence. Your promotional piece has to generate:

- **A**ttention (slogan, headline, color)
- **I**nterest (show how to meet a need)
- **D**esire (show advantage over competition. Give additional reasons for choosing your school (i.e., transportation, after school program, tuition payment plan)
- **A**ction (You want your audience to act by doing something, but you also have to act by keeping your message before the audience. Ask yourself “What’s next?”)

Emphasize themes most important to your targeted audience that are consistent with the school’s mission and actual performance.

- Emphasize the factors most important to your primary target audience.
- Address tuition levels forthrightly.
- Emphasize factors for which there is no gap between perceptions of your schools and reality.
- Back up claims with facts whenever possible.
- Sell the benefits not the attributes – What’s in it for me?”

What Should be in Your Information Packet?

- A word/theme of welcome
- Clearly stated mission/goal
- Specific examples rather than lofty or philosophical phraseology
- Speak to your strengths
- Provide contact information
- Tie in with secondary information – INTERNET

Possible Elements of an Information Packet

Descriptions

- Catholic environment
- Teachers who make extra effort for kids
- Religious education
- Sense of community
- Teaching moral values
- Educating the whole child
- How discipline problems are handled
- Welcoming children of all faiths
- High academic expectations

Specific Facts

- Class sizes
- Test scores
- Principal/teacher certifications
- Parent satisfaction from surveys
- Transportation options
- Help available for children with special needs
- Success of alumni
- Sports and other extracurricular activities

Show Benefits and Be Selective

- Description and facts are not important in themselves – they should be used to support benefits to children or parents, i.e., “children get more attention and help with our small class sizes,” - not “class sizes are small.”
- Attempting to use too many elements in an information packet or brochure or ad will dilute your message – choose the most important ones and be ready to answer questions about the rest.

Follow Up After

Everyone who receives an Information Packet, especially during a school visit, should receive a follow-up phone call.

Did It Work?

Determine at some point if the strategy you used accomplished the goal you set, (i.e. did the information kit provide enough information for users to make the decision to choose your school for their child? Did they get the “benefit” messages?)

Tie in with Secondary Information – Your School Website

Informational pieces and packets should always direct people to your school web site. Your school web site should present some of the same messages contained in school information packets.

Suggested Summer Recruitment Activities

If you actually plan for a year-round recruitment and retention plan, it is important to include some strategies for the long summer vacation. The following suggestions may help you to develop your plan for summertime recruitment activities.

Strategies for Incoming Students

- *Informational Letters:* Be sure to maintain contact with those who have registered for Pre-School, Kindergarten or first grade. Some will have had little, if any, contact with the school from the time of registration (as early as January). Send a letter or letters confirming registration, addressing typical parent concerns, or simply indicating when more information may be forthcoming concerning topics such as AM or PM Kindergarten, transportation, dress code, etc. You can also use the letter(s) to convey information about the value of a Catholic education and about your school.
- *Personal Contact:* Suggest that your individual teachers call or write each family to welcome them and offer to answer questions. They could also provide a list of readings, some activity sheets or some preparatory assignments to help ready the students for class.

Strategies for Recruiting Additional Incoming Students

If you have a waiting list, additional recruitment is obviously not an issue. For those with additional space, however, some follow-up may be valuable.

- *Targeted Letter:* Most parishes can identify families with children of school age. A personal letter or note with a brochure and other information about the school might generate interest. Offer a summer tour of the school.

Strategies for Retention During the Summer

- Make and maintain personal contact. A note from a teacher welcoming each student would be helpful, perhaps explaining what the student has to look forward to for the coming year.

- Provide learning packets (and provide recognition for completing them). They could contain such items as reading lists, activity sheets, exercise sheets, learning games, appropriate software suggestions, etc.
- Consider recruiting volunteers to keep open the gym, library and computer lab regularly. Invite the whole parish to participate.
- Ask the pastor to talk about the school during Mass at some point over the summer.
- Invite students and families to come in sometime in the summer to help decorate and prepare the building for the opening of school.
- Invite students and families in over the summer for “feedback sessions” on how to improve the school.



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Catholic Schools Week Planning Grid

Insert Here



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Sample Evaluation Form for Open House – Parent Form

Parent’s Name(s): _____

Please answer each question honestly. We designed our Open House to address the information needed by parents and students. Your feedback will be used to evaluate this year’s program and to improve our design for next year. You may put the survey in the box marked “Evaluation Form for Open House”. Thank you for coming and for responding to this questionnaire.

1. Did you receive the kind of information you wanted?

Yes No Partially

Comments: _____

I wish I could have learned more about: _____

2. Did you have enough opportunity to hear from the following people?

Yes No

Administrators

Teachers

Students

Parents of Current Students

Coaches

Counselors

Alumni

3. The best part about the Open House was: _____

4. The Open House could be improved by: _____

5. I heard about the Open House through: (check all that apply)

Current Family/Student

Alumni

Administrator/Teacher

Parishioner

The Catholic Spirit

Other Newspaper (specify) _____

Parish Bulletin (specify) _____



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Other (specify) _____
 Billboard Radio Poster (where?) _____

6. When my son/daughter enters high school, he/she:

will attend _____
 might attend _____
 probably will not attend _____
 has not yet decided

Please give your reasons for the above choice: _____

Current School: _____ Grade: _____

Thank you for completing this questionnaire!



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Sample Evaluation Form for Open House – Student Form

Student Name: _____

Please answer each question honestly. We designed our Open House to help you. Your feedback will be used to evaluate this year’s program and to improve our design for next year. You may put the survey in the box marked (Evaluation Form for Open House”. Thank you for coming and for answering this questionnaire.

1. How much information did you receive about St. _____ today? ____
much information ____ some information ____ little information

I learned most about: _____

I wish I could have learned more about: _____

2. How did you feel about your welcome today?
____ I felt very welcome ____ I felt OK ____ I felt a little unwelcome

Why? _____

3. Did you have enough opportunity to hear from:

- Yes No
- ____ ____ Students
- ____ ____ Teachers
- ____ ____ Activity, athletic and counseling staff
- ____ ____ Parents of current students
- ____ ____ Alumni
- ____ ____ Administrators

4. The best part about the Open House was: _____

5. The Open House could be improved by: _____



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6. I heard about the Open House through: (check all that apply)

- Current Family/Student
- Alumni
- Administrator/Teacher
- Parishioner
- The Catholic Spirit
- Other Newspaper (specify) _____
- Parish Bulletin (specify) _____
- Other (specify) _____
- Billboard Radio Poster (where?) _____

7. For my high school, I

- will attend _____
- might attend _____
- probably will not attend _____
- have not yet decided

Current School: _____ Grade: _____

Thank you for completing this questionnaire!



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Sample Telephone Recruiting Script

Hello, Mrs./Mr. _____, my name is _____ and I am a teacher/parent at _____ School. I'm calling families with children about to enter Kindergarten/first grade and I thought you might want to hear a little about our school. (If "yes," get mailing address)

Thank you for your interest in _____ School. If you have any questions about the school, please feel free to call.

OR
(If "yes,")

There are 3 facts about _____ School that I would like to share with you:

- The most important difference between _____ School and our local public schools is that, in addition to a good academic program, _____ School helps parents with their child's spiritual and moral development. Although many public schools do offer a good academic program, by law they must be neutral with regards to values and often cannot help children distinguish between right and wrong. _____ School reinforces the Catholic-Christian values you teach at home.
- The academic program at _____ School is also very good. We have a respectful and disciplined environment very conducive to learning. Teachers here are both caring and demanding. Parents are welcomed and invited to be a part of the educational process. As a result, our students score above national averages on standardized tests and are given a solid academic foundation for high school and beyond.
- Although _____ School is not supported by tax dollars as public schools are, our tuition for this year amounts to only \$_____ a day; far less than the average day-care center. _____ School is clearly worth that level of investment for your child's future.

Do you have any questions about the school I could answer?



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Thank you for your time. Please consider _____ School for your child(ren) because, as our school slogan states, _____.

(If "No,") Would you be interested in some literature about the school?

(If still "No,") Thank you for your time. If you have any questions about the school in the future, please feel free to call.

Sample Recruitment Plan

St. Patrick School Recruitment Plan 20XY-YZ

Of First Importance:

- Parent support
- Open door policy
- Sense that parents, teacher, principal, are team members working together to solve problems

Process:

- Parent calls/secretary welcoming
- Invited to visit (tour) the school
- An invitation packet is sent containing all pertinent information

Action Items:

- **Personal contact** of all potential Pre-K through Eighth Grade parishioners and students from neighboring parishes without schools.
 - Personal contact with all potential students will continue through August and into and throughout the new school year.
- **Recruitment--**Committee for on-going recruitment has been initiated and approved for the upcoming school year.
 - Catholic and families of other faiths already enrolled feel the need to support each other and to definitely support the school as the focal point of a good Catholic Christian education for the students in our school communities. Our families have made a commitment to each other and to the school to make every effort to increase the student population of the school.
 - Parish families and all non-affiliated families have received a commitment from the pastor, parish and administration to support their efforts. A variety of fundraisers have been established with organizations and corporations.
 - We believe parents are our best publicity within the perimeters of the parish and surrounding areas. Communications via word of mouth has proven to be our greatest resource for new students.

- **Public visibility/recruitment**
 - Our interest in local papers as well as our TV ads has been productive.
 - A banner describing the school and what it offers will be affixed in a permanent location outside of the school building over the summer.
 - Billboard space in a prominent location on our street has been rented during spring registration for the upcoming school year.
 - A registration banner has been appropriately displayed outside the school building announcing new registrations for the upcoming school year.
- **Flyers and brochures**
 - Flyers and brochures have been prepared for distribution to various establishments (e.g. Doctors' offices, dentists' offices, realtors, accounting offices, etc.)
- **Tours**
 - Tours are available upon request, including evening hours to accommodate working parents. Tours include classroom visits with brief observation, visit to the cafeteria, library, and computer room as well as general question and answer dialogue.
 - Other areas of interest during the tour include a sample handbook, curriculum guidelines, and standardized test scores.
- **Introductory packet**
 - When a prospective parent comes to tour our school, a packet of information is given to them to peruse. The Packet contains:
 - School Strategic Plan
 - Curriculum description
 - Test score results
 - Most commonly asked questions information sheet
 - Textbook list
 - Registration form
 - Student Handbook
 - Tuition policy and schedule
 - Class schedule (grade level of the applicant)
- We encourage prospective parents to call us with questions.
- Be welcoming! Be pleasant! Answer even the most ridiculous questions with sincerity!

Exit Survey Overview

Despite our best efforts, there are times when parents and guardians do not reenroll their child or children in our schools. It becomes incumbent upon us to understand the reason or reasons why. This has a multiple purpose:

- First, it is an opportunity to understand why and take measures to effect change within your school.
- Secondly, it provides an opportunity to re-establish a relationship with a potentially dissatisfied parent and guardian and reduce the image damage that they can do in the community.
- Third, we cannot fix something if we don't know it's broken.
- Finally, the information gathered will impact your marketing plan. Besides being good customer service, it's the right thing to do.

The sample survey is designed to provide you with sample survey questions and should be modified in any way that you think is necessary for your school. It can be conducted in one of three ways. First as an interview guide for a face-to-face exit interview. This is the preferable method. The second way is to use it as a script for a telephone interview. The third way is to use it as a mail survey.

In an exit survey you are looking for specific trends that point to a larger organizational problem. Of course, this survey could also point out a one-time event that has the potential to be corrected immediately. The information gained should be shared with your pastor, staff, parents and school advisory council.



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Sample School Parent/Guardian Exit Survey

Insert Here

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