



COUNCIL ON EDUCATIONAL
STANDARDS & ACCOUNTABILITY

2020 CESA Enrollment, Financial Aid, and School Opening Trends

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As the 2020-21 academic year began, the effects of the COVID-19 crisis continued to be felt by Americans, especially with respect to school reopening plans. CESA schools from across the country and world prepared early, implementing health and safety plans, varied learning modalities, and continued to prioritize the deeply incarnational and sacred nature of Christian schooling. In July, CESA released the results of the Return to School survey aimed to understand reopening *plans*. At that time, 98% of CESA schools had an in-person option planned for the opening of school¹. In July, 76% of CESA schools were planning for multiple modalities of learning, along with planning for a wide variety of enrollment, and therefore budget scenarios to begin the year. While most schools planned to remain stable or have a small decrease in enrollment at the start of school, the myriad questions around local policies, epidemiological trends, and many other factors left school leaders with greater ambiguity about what opening day would look like than ever before.

The intent of the September survey was to understand the real-time impact on CESA schools' enrollment, financial aid, and pedagogical options as school opened so that we are able to look ahead to our retention, recruitment, financial plans, and pedagogical methods for the 2021-22 school year.

Sample

The survey was sent to Chief Financial Officers of all CESA Member of Council and Candidate schools. The data was collected during the period of August 26- September 4th, 2020. With a response rate of just over 60%, the sample represents the CESA cohort well.

Enrollment

The 2020-21 enrollment trends articulated a promising year for many CESA schools. With nearly three-quarters (73%) of CESA schools reporting either steady (13%) or increased (59%) in enrollment and just 27% reporting decreased enrollment (see Figure 1), there is much room for gratitude and optimism about the health of CESA schools. By comparison, NAIS schools are seeing a different picture of school enrollment with smaller proportion (51%) of reporting NAIS schools experiencing either steady (19%) or increased (32%) enrollment and more substantial 49% in decline.

¹ The full report can be found at www.cesaschools.org/resources

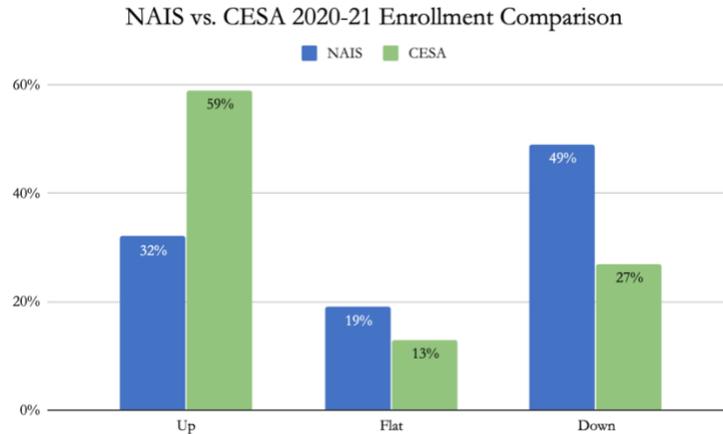


Figure 1: Comparison of macro-level enrollment changes at NAIS and CESA Schools for the 2020-21 School Year

On a more granular level (see Figure 2), the largest share of CESA Schools (46%) are reporting increases in enrollment of less than 5%, with a mean increase of 2.7% and a median increase of 3%. CESA Schools reported a range of 11% growth to 17% decline in enrollment. While we do not have data correlating schools' 2020-21 enrollment changes with their trajectories from years past, we will have more longitudinal data gathered in the CESA Profile Survey², which is scheduled to be released in January 2021.

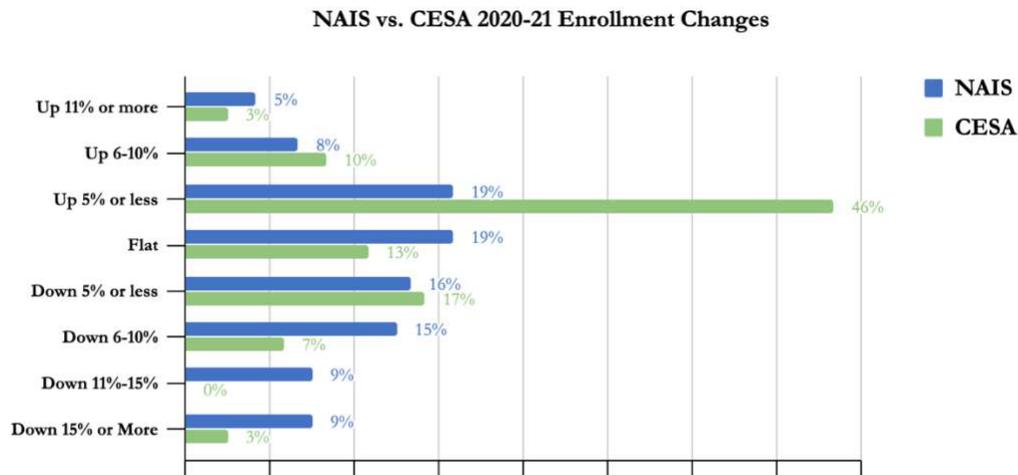


Figure 2: Comparison of ranges of 2020-21 enrollment changes for NAIS vs. CESA Schools.

There are certainly regional impacts influencing enrollment trends, with schools in oil markets or those with local restrictions on opening private schools more likely to experience declines, and those schools located in regions where return to school for public schools was virtual more likely to have reported increases in enrollment.

² The CESA Profile Survey has been sent to each CESA Member of Council and Candidate School. Completion of the Profile is a requirement of membership; all schools should have submitted data by November 1st, 2020, with the report being released early in 2021.

Additionally, the NAIS sample³ includes a more substantial portion of boarding schools, which may contribute to the overall increased international student decline (see Figure 3) and the larger proportion of NAIS schools experiencing declines in enrollment. Just 3% of NAIS schools reported reporting an increase international student enrollment and 65% reported declines in that population.

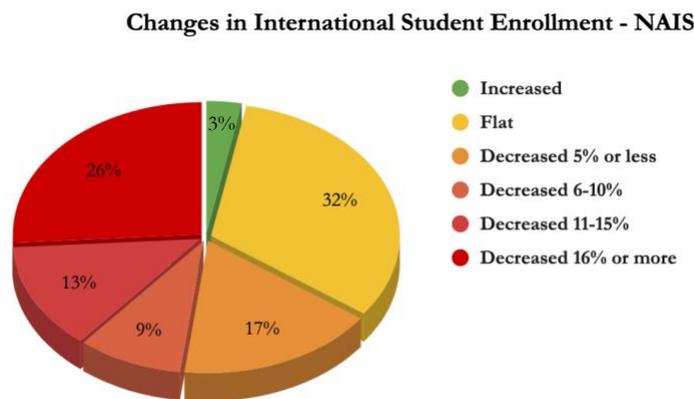
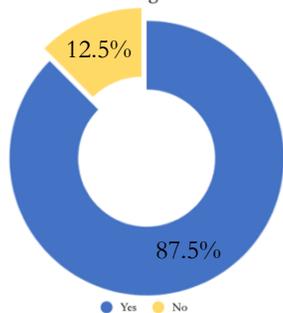


Figure 3: Change in international student enrollment in NAIS Schools from 2019-20 to 2020-21.

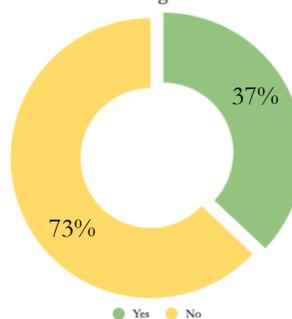
Financial Aid

During the course of the spring and summer of 2020, there was a great deal of conversation on CESA calls about emergency financial aid funds, procedures to enable families to apply for increased financial aid in non-traditional ways, and budgeting for the 2020-21 school year. In a stark contrast between CESA and NAIS Schools (see Figure 4), the vast majority of CESA Schools (87.5%) increased their financial aid budgets, while only 37% of NAIS schools did the same. Correspondingly, the number of students on financial aid increased in 84% of CESA Schools. CESA Schools reporting an increase to financial aid budgets had a mean increase of 18% and a median increase of 16% in financial aid dollars.

CESA Changes to Financial Aid Budget



NAIS Changes to Financial Aid Budget



³ Thank you to our friends at NAIS for sharing their schools' data for this report.

Figure 4: Comparison between CESA and NAIS schools' changes to financial aid budgets for the 2020-21 school year.

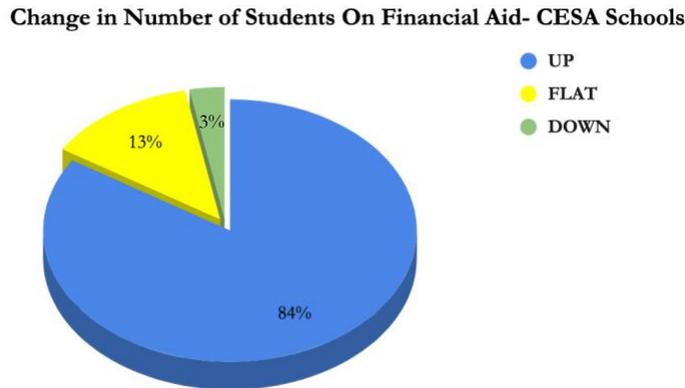


Figure 5. Overview of changes in number of students receiving financial aid grants between 2019-20 and 2020-21 school years.

Learning Platforms

In the Return to School Plans report released in August of 2020⁴, 98% of schools reported planning for face-to-face instruction with some modifications, and 76% of the respondents were planning for at least one instructional delivery method in addition to face-to-face learning. With the myriad differences in local- and state-level restrictions on opening, we expected to see shifts in these data, but within the margin of error, the overall trends remained consistent, with 73% of CESA schools utilizing a synchronous learning option (see Figure 5).

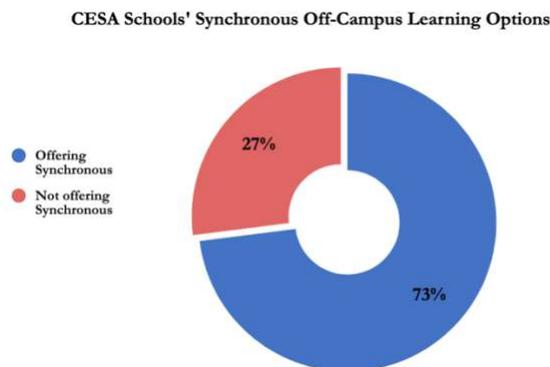


Figure 5: Overview of schools' use of synchronous learning options at time of opening.

To clarify the data further, an additional survey was administered to better understand the reality of schools' opening. With an 80% response rate, we found that nearly 80% of CESA schools reported offering full time on-campus learning options (64% with added distance learning options and 14.5% solely in-person options). Additionally, another 14.6% of schools reported operating hybrid solutions. Just 7.3% of CESA schools reported using online-only methods (see Figure 6). Those opening with 100% distance learning were in California, Rwanda, and Dominican Republic.

⁴ This report can be found at www.cesaschools.org/resources

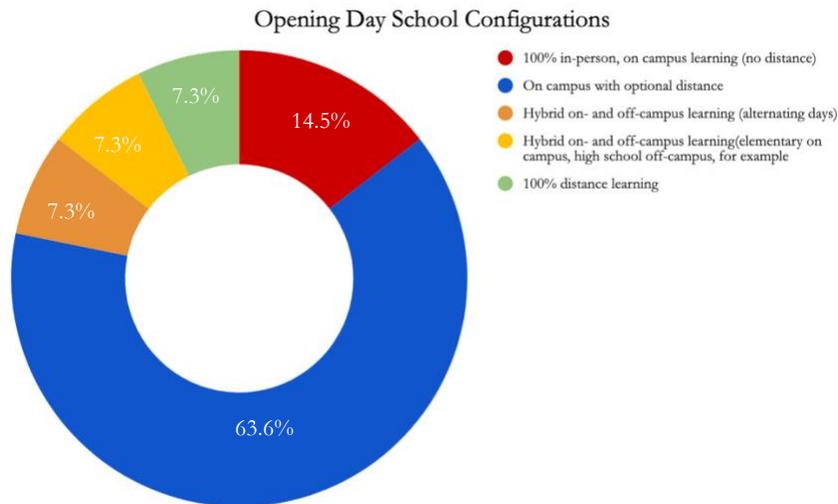


Figure 6. Overview of content delivery methods used to open CESA schools in 2020-21 school year.

Lastly, schools utilizing distance learning were asked to describe their delivery methods. The majority of these schools (97.8%) were using synchronous learning (see Figure 7). Just over half of CESA schools with multi-access options are using only synchronous learning (54.3%), with another 43.5% using both synchronous and asynchronous.

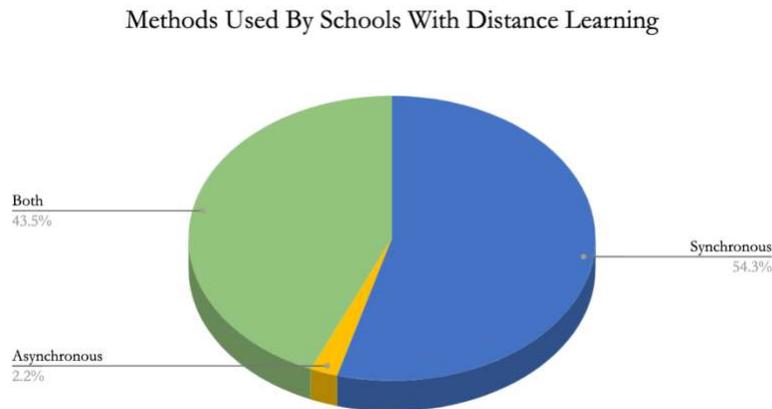


Figure 7. Content delivery methods used in schools offering distance learning options.

Discussion

While there is much to be encouraged by in this report, there are some larger questions that surfaced through the analysis. Moving through this year of responding to the COVID-19 pandemic's effects on public health, parental expectations, surrounding schools' policies, and local government's policies will have most schools in a period of major transition and instability for the duration of the year. Add to that issues with racial justice and a contentious election year and we are bound to have added complexity to the school year. In many ways, of course, this instability has allowed us to consider our mission with greater focus and emphasis and highlight the

extraordinary talent, tenacity, and commitment to an incarnational, relational Christian education exemplified in our schools' responses.

While we can celebrate the general trends in many of our schools, we acknowledge that the work of preparing our schools and communities for the 2021-22 school year is also underway, and with these trends, we believe there are several questions for our schools to consider.

1. With the large number of schools reporting increases in enrollment, there is reason to be encouraged and grateful. These students will be hearing the truth of the Gospel, and for this, we are thankful. Growth, of course, *can* have an unexpected disruptive effect, especially in a year in which our typical events calendar has been upended. With the campus restrictions in place which limit tuition-paying parents' time on campus during which they can experience their investment. We have also observed a difficulty integrating new students into our school communities, many of the safety measures in place which limit student interactions. All of these limitations may exacerbate tensions that are implied from the stress of the pandemic, issues of racial justice, and the Presidential election. Therefore, *we believe schools should be considering the ways in which their communication strategy, touch-points with parents- both new and returning- throughout the year, and school traditions and the daily student experience can integrate new families into the school culture.* The ways in which we highlight the value proposition of the school and ensure new students are acclimated to the culture of the school, connected socially to other students, and cared for emotionally and spiritually should be considered in ways different from years past.
2. Related to the considerations above, we believe that retention efforts will be increasingly important, and should begin early and invested in intensively. It is clear that the experiences our families are having this year will be unlike years past, and in many ways, families will not experience the fullness of what our schools are. Similarly, some of the new families in our schools may not have enrolled for the long term, rather as a short-term fix for the reality of their other educational options. Therefore, *we believe schools should be consider how they can develop robust, institutionalized retention strategy that is implemented earlier in the calendar than years past and more comprehensive.* Similarly, schools should consider realistic retention goals that may be lower than in years past.
3. A major finding of this work relates to the sharp increase in the number of students receiving financial aid and the proportion of schools having increased their financial aid budgets, especially in contrast to our NAIS peer schools. While many of our schools raised emergency funds to buttress their financial aid budgets for the 2020-21 school year, *we believe there should be in increased focus on future impact of these increases for the 2021-22 school year and beyond.*
4. Over 78% of CESA schools reported using multiple learning platforms; additionally, those schools opening 100% distance are working toward bringing students back to campus. While our schools should be commended for working hard to retain students by offering choices in learning modalities, our observations of the operations of schools this fall highlight the herculean efforts of our teaching faculty in these scenarios. Additionally, we are seeing our administrators working extraordinarily hard to serve families both on- and

off-campus, manage the administrative work of students moving between on- and off-campus learning, and implement and maintain the safety measures our schools have designed. There are risks in this climate with respect to job satisfaction, burnout, and maintaining the healthy cultures many of our schools have worked hard to create and sustain.

Also related to this reality, we have observed a trend amongst administrators to pull back on teacher evaluations, professional development, standardized tests, and other measures of our academic outcomes in efforts to reduce the burdens of our teachers. There is a clear tension that our school leaders are navigating to ensure, on one hand, that our students are receiving the very best Christian education, and on the other hand, caring for the health of their teachers and administrators. *While there are well-intentioned reasons to do many of these things, we believe schools should consider enhancing the ways in which they can continue to provide the highest of professional and academic standards while caring for the spiritual, physical, and emotional needs of their people through the 2020-21 school year and leading into the 2021-22 school year.*

5. Our schools have worked incredibly hard to ensure students are receiving a high-quality Christian education whether they are at home or on campus. *With the vast majority of our schools utilizing distance learning this year, most of which for the first time, leadership teams, heads of school, and Boards should be considering how the structures in place this year will impact learning options for years to come.*

Closing

The reality of the last six months of rapid change in our schools has provided the opportunity to strengthen our creative and strategic muscles to ensure our schools are meeting our God-given missions. As we are now settling into our school years, we have the ability to look ahead to 2021-22 and beyond, reflecting on why our schools exist today and what that means for how we plan for the future.

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