

# **SHADY HILL SCHOOL**

## *Strategic Plan*

**May, 2002**

**FINAL**

## SHADY HILL SCHOOL MISSION STATEMENT

Shady Hill School wants children to be joyful, active learners who become confident and ethical citizens of the school community and the world beyond. We believe in the primacy of exploration and discovery, we advance the mastery of skills, and we help students shape meaning from knowledge. To accomplish these ends, the school:

- Knows and honors the individual character and spirit of each child
- Respects the pace of childhood and understands that true exploration takes time
- Creates a safe environment that allows children to be curious, take risks, and make mistakes
- Encourages children to be independent thinkers and doers
- Advocates learning through cooperation and collaboration
- Designs and uses Central Subject, and interdisciplinary curriculum with a deep focus on a single theme or year-long topic
- Emphasizes contact with primary sources and actual materials
- Values creative thinking and intellectual discipline
- Helps children discover the power of the imagination
- Promotes the leadership of teachers and invests in their professional development
- Offers a stimulating teacher training course for those preparing to enter the profession
- Challenges prejudice, respects difference, and recognizes that multiple perspectives inform human experience
- Forges a lively, interdependent community of students, teachers, parents, alumni and administrators who work together to achieve the school's mission and sustain its values.

*May 2001*

## INTRODUCTION

In planning, an old maxim applies: “If you don’t know where you are going, any path will lead you there.” Shady Hill School began its planning process in the summer of 2001 precisely to concentrate its human and financial resources on ends the school community agrees are most essential. Planning marshals thought and action.

The school, by every indicator, is healthy and robust. In the absence of an endangering crisis, Shady Hill can strengthen itself further, seeking new opportunities and exploring innovative practices that will better enable it to meet its mission. The planning process, therefore, centered both on supporting ongoing initiatives as well as defining new ones.

Led by a Steering Committee, strategic planning focused the fall, 2001 board retreat, employed three subcommittees made up of 40 board members, parents and faculty, surveyed alumni/ae, and solicited the views of the broader community at several meetings. Areas of inquiry included program, faculty, teacher training, finances, physical plant, and development. Embedded in each of these are Shady Hill School’s abiding commitments to a mission that fosters deep intellectual inquiry, views diversity as an imperative, and understands that a strong faculty is key to the school’s success. These essential commitments are rooted directly or indirectly in every word of this document.

We hope this plan fires the imagination of this school community, and leads it both to sustain what is remarkable about Shady Hill and to identify new directions in which to innovate and grow. Over the next years, the school must expand its programmatic vision to include service, a more defined global focus, and community partnerships that strengthen its ties to the world beyond. The school’s faculty must preserve the school’s historical emphasis on students’ intellectual development while recognizing the need for clarity about academic expectations. In turn, the Board and administration must take care to sustain the strength of its faculty and apprentices, and find ways to support financially its most important goals.

There is much to accomplish in this plan, and portions of it will cost money. Part of the planning process is to develop a manageable implementation over the next many years. At the end of the plan, the first year objectives are included.

This current draft represents the first phase of the planning process. In most instances, it envisions the future broadly with the hope of generating discussion and dialogue that will lead to more specificity and detail. Therefore, many priorities are yet to be set; many decisions are yet to be made; funds must still be raised to enable some of these initiatives to come to life.

## **I. PROGRAM**

Shady Hill must always be vigilant in keeping the program mission-driven and effective. The quality of academics, athletics, and arts should remain healthy and vigorous, and equally important, the school needs to maintain a secure climate for the social and emotional growth of its students.

Thoughtful planning must ensure classroom support, enabling best practices and innovation to flourish, and maintaining Shady Hill's position of national leadership. Shady Hill's reputation was built on an innovative academic program as well as by powerful intellectual and artistic emphases. These require sufficient time in the schedule for children to learn, and teachers to teach. Exploration and discovery, and a commitment to learning in depth, are essential to our program. Additionally, we recognize that we must pay attention to the vastly changed demographics of the school community and be sure that the school's program remains distinctive and dynamic.

### **Goal**

#### **A. Enable best teaching practices and educational innovation to flourish.**

#### **Actions**

1. We recommend that the Director be charged with developing a plan to address the following issues and for making recommendations to the Board of Overseers in areas with strategic implications (e.g. mission/policy, staffing, finance, facilities).

#### *New Initiatives:*

- a. Incorporate the findings of the Multicultural Study to optimize the experience of all children at Shady Hill, especially in terms of academic achievement, relevance of curriculum, and communication between the school and families.
- b. Clarify the goals for the moral and ethical development of students, focusing especially on the role service should play in promoting active partnerships and meaningful engagement between the school and the world beyond Shady Hill.
- c. Align the central subjects across the school so that they achieve appropriate balance between the Western and American heritage on the one hand, and a more global world view on the other.
- d. Develop a curricular vision for the use of educational technology across the school that will enrich students' classroom experiences while being cost-effective.

#### *Ongoing initiatives:*

- a. Articulate clearly curricular benchmarks across grades and departments in order to clarify goals at every level, and develop communication strategies between and within grades to ensure appropriate continuity of classroom experience.
- b. Institute a system for continuous, cyclical curriculum review in all areas, including the central subjects, to ensure relevance and vitality.

**Goal**

**B. Attract and enroll a student body who will thrive in the school's intellectually demanding atmosphere, whose families support Shady Hill's mission, and which reflects the diversity of the greater Boston area.**

**Actions**

1. We recommend the Director establish processes to:
  - a. Examine, and where appropriate, redefine admission policies and practices concerning ethnic and cultural background, affiliation, socio-economic balance, and range of learning styles, to sustain this goal.
  - b. Increase financial aid to middle income families using funds made available by augmenting the endowment.
  - c. Streamline admissions procedures and practices with the goal of minimizing its impact on current students and faculty as much as possible.
  - d. Maintain consistency and clarity in printed and web admission materials.

**Goal**

**C. Continue to provide an after school program that is consistent with the school's mission and which models best practices.**

**Action**

1. We recommend the regular review of Afterschool to determine staffing, program, and financial implications.

**Goal**

**D. Ensure that the guidance and assistance with the placement process to secondary schools is strong and successful.**

**Action**

1. We recommend the Director review the transition to secondary schools, both public and private, given the impact of the larger number of graduates and the more competitive independent school admissions environment, to ensure that it is effective, provides appropriate support to families, and remains consistent with the mission.

## **II. FACULTY**

The strength of the faculty directly determines the quality of the school's educational program. The school must focus its resources to: a) aid in the retention of its teachers, administration, and staff, and b) enable the school to hire powerful replacements when openings occur, including a more diverse faculty. Sound retention strategies will provide effective recruitment incentives as well.

### **Goal**

#### **A. Attract, hire, and retain the most talented faculty.**

##### **Actions**

1. We recommend the school maintain its current policy on faculty compensation to provide salaries in the top 10% of NAIS member schools, and to strive to provide the best compensation package among AISNE elementary schools.
  - a. Continue to evaluate the benefits package.
  - b. Explore levels of interest in, and priorities among, new programs and benefits for school employees, such as day care, housing, or tuition assistance.
  - c. Examine the relationship of the Shady Hill scale to those of area public schools to ensure its competitiveness.
2. We recommend that the administration create professional development programs that use available funding to ensure the connection to stated school-wide goals, especially those that:
  - a. Develop skill and understanding about working with diverse communities.
  - b. Increase faculty awareness about teaching strategies that address different learning styles.
  - c. Strengthen the faculty's ability to use teaching strategies that foster academic and intellectual growth.
3. We recommend that the administration improve the current induction program for new faculty members.
  - a. Clarify the role of faculty mentors, including regular contact and duration of formal relationship.
  - b. Review the current orientation process to ensure new faculty members have the information and background they need to be successful.
4. We recommend the school strengthen the Evaluation and Professional Development program to provide opportunities for regular, systematic communication about performance, increased connection to professional development, and annual articulation of individual goals.

## **Goal**

### **B. We recommend a renewed effort to attract, hire and retain a diverse faculty.**

1. Develop a specific, achievable plan to attract, hire and retain faculty and staff of color in order to meet the Board-defined goal of having faculty, staff and administrators of color equal the proportion that exists in the student body by 2006.

## **III. TEACHER TRAINING**

Started in 1928, Shady Hill School's Teacher Training Course (TTC) is integral to the entire program, and its strength and purpose must be sustained. It is a unique program that enriches the school as a community of learners, and has placed Shady Hill-trained teachers and educational leaders in both public and independent schools nationally and internationally.

The TTC serves as a model in the larger world of teacher education. In order for the TTC to maintain the strength of that model, the school must recognize that many competitors pay young teachers for an internship year, that many people of color seek training that is focused on urban issues, and that the competition for teachers generally (including those willing to take a year out to train) is fierce. We have responded by finding increased aid and initiating an urban-focused program. We must find ways to keep this vital program competitive and strong.

## **Goal**

### **A. Maintain the TTC as a strong, vital, and relevant program for the training of new teachers.**

#### **Actions**

1. We recommend an analysis of the program's finances to enable us to attract a strong and diverse applicant pool, specifically to:
  - a. Increase endowment giving to fund additional aid to TTC students,
  - b. Consider a student loan program for qualified TTC students,
  - c. Explore further subsidized housing opportunities,
  - d. Provide an employment resource guide to assist TTC students in finding part time work with SHS families or with others while in the program,
  - e. Examine the fee structure, especially in relationship to stipend-paying programs.
2. We recommend expanding the collaboration with the Cambridge public schools and Summerbridge Cambridge to provide an opportunity for a more urban teaching experience through the Urban Fellows program.

## IV. FINANCES

No issue facing the school is more consequential than financial equilibrium. We strive to keep tuitions from growing beyond our families' means, while meeting the demands for a rich and heavily staffed program, supporting a commitment to teacher compensation, maintaining extensive financial aid, and allowing for adequate plant renewal.

While the school's financial health is the strongest in its history (with long waiting lists, a substantially increased endowment, adequate annual contributions to the plant fund, and expanded fundraising), danger lies below the surface. With annual tuition increases running at least twice the rate of inflation, and teacher shortages driving up compensation, the school would be unwise to assume that it can perpetually fund its needs with tuition expansion alone.

There will, however, be no dearth of new programs to fund. To meet our needs, we must be clear about maintaining stasis in some areas, recognize where programs that have served their purpose or grown outdated may be discontinued, and envision the future through an entrepreneurial lens, our eye toward ideas that will generate non-tuition revenue.

We must also promote strategies to keep the middle class and avoid the "barbell effect" of rich and poor. Increased income over the past years, generated by the annual fund, endowment, and a larger enrollment, have not forced us to make the hard choices that we may have to make in the future. We also need to look at financial aid. Increasing aid is expensive, and the amount of aid distributed is already among the highest of our peer schools. Rising tuitions, however, and the need to retain faculty, necessitate examination of our financial aid policies in particular, and to consider our financial future in general.

### Goal

**A. Maintain affordability, diversity and competitiveness by a careful analysis of revenues and expenses.**

### Actions

1. We recommend the school maintain its practices of moderate tuition increases, superior faculty compensation, and adequate plant funding.
2. We recommend the Finance Committee propose to the full board a future expansion of financial aid, funded primarily by a larger endowment, to increase the amount of aid available to middle income earners.
3. We recommend the school continue to expand its non-tuition revenues by creating or augmenting auxiliary programs, and by increasing the goals for giving.
  - a. Create a plan to increase revenue from auxiliary programs.
  - b. Develop a Master Plan for Fundraising to support the goals of the strategic plan (see VI. DEVELOPMENT).

## V. PHYSICAL PLANT

The Board and the school community must take care to preserve the extraordinary resource of the buildings and grounds. Some parts of the plant function better than others. The gym, built in the '60s, and the main building, erected when the school was first built, represent two areas where the spaces no longer fit the program. The gym is crowded, has poor egress, major leaks, and problems with flooding. When used as the all-school assembly spot, it lacks aesthetic appeal, as well as acoustic and visual integrity.

When the main building was erected, no one could have anticipated the size of the future administration, serving the vastly increased demands in admissions, fundraising, teacher training, tutoring, and finance. Administratively, we long ago outgrew this space. The much-loved assembly hall itself is hot and stuffy during most of the year, has inferior ventilation, and poor sight lines. Across the school, performance space is at a premium.

Examining these buildings, along with other spaces—especially the shop and studio, and the perennial problems with parking and traffic—is essential. Where conditions or program warrant replacement or renovation, the Board must adopt a well thought-out plan for financing the changes.

### Goal

**A. Renovate and/or replace buildings which no longer serve our program well, while preserving the unique character of the Shady Hill campus.**

### Actions

1. We recommend that the Building and Grounds Committee review and revise the facilities master plan in light of evolving circumstances, and prioritize projects to accommodate the school's programmatic needs.

*The following buildings are priorities for renovation or replacement as part of a master plan, based on their physical condition and the limits they place on our program. This review must also consider the costs of these projects, and the capital planning required to complete them. Any review would necessarily require consultation with appropriate faculty and staff.*

2. We recommend the Buildings and Grounds Committee plan for a new or renovated gym.

- a. Meet current and future space needs of the Sports program.
- b. Review the performance space needs.

3. We recommend the Buildings and Grounds committee consider the condition and use of other buildings, especially the shop, studio and science buildings.

4. We recommend the Buildings and Grounds committee plan for a new or renovated main building.

- a. Meet current and future space needs for each area housed in the main building.
- b. Review the performance space needs.

## VI. DEVELOPMENT

Non-tuition revenue sources continue to be critical for the school's financial health. Development efforts need to maintain the high participation and level of giving by current parents, as well as plan for future capital needs. As we move forward, we must maintain our current, sensitive approach to fundraising with the parent body, so as not to disenfranchise those who are unable to give at a substantial level, while encouraging those who can give generously to do so. Acknowledgements of contributions should be made at all levels, including gifts of volunteer time.

Among independent elementary schools, Shady Hill's fundraising with its alumni/ae especially is a source of envy. Our development efforts, however, need to capitalize further on the loyalty of its graduates so that the alumni/ae group continues even further to nourish the school and its aims. Alumni/ae represent a significant way to relieve financial pressure on current parents. Parents of alumni/ae, grandparents, TTC graduates, and others with affiliations to the school should be actively encouraged to increase their financial support of the school as well. We also need to continue our efforts with major gifts.

### Goal

**A. Develop Master Plan for Fundraising to support the school's strategic goals: financial equilibrium, compensation, plant renewal, and endowment building for expanded financial aid, professional development and the teacher training program.**

### Actions

1. We recommend that the Development Committee, in response to the strategic plan, develop a plan for continued robust annual giving and future capital needs.
2. We recommend that the Board adopt a more focused stance toward achieving these fundraising goals, and that the Board itself become a leader in this area.

## VII. IMPLEMENTATION

Responsibility for the implementation of this plan will rest with the Director and the Board of Overseers. The Board, in conjunction with the Director, should periodically review the progress and continue to define the priorities of the implementation process. The Board will continue to invite members of the community to contribute to the planning and implementation process in a variety of ways and will report regularly on progress and developments.

**SUMMARY OF RECOMMENDATIONS FOR 2002-2003**

Given the broad range of topics outlined in the plan, for the next academic year the school will focus on:

1. Incorporating the findings of the Multicultural Study to optimize the experience of all children at Shady Hill, especially in terms of academic achievement, relevance of curriculum and communication between the school and families (Administration and Multicultural Committee);
2. Articulating clearly the curricular scope and sequence across grades and departments in order to clarify appropriate academic and intellectual development goals at every level (Administration);
3. Instituting a system for continuous, cyclical curriculum review in all areas, including the central subjects, to ensure relevance and vitality (Administration);
4. Reviewing the transition process to secondary schools, both public and private, given the larger number of graduates and the more competitive independent school admissions environment, to ensure that it is effective, provides appropriate support to our families, and remains consistent with our mission (Administration and Education Committee);
5. Developing a specific, achievable plan to attract, hire and retain faculty and staff of color in order to meet the Board-defined goal of having faculty, staff and administrators of color equal the proportion that exists in the student body by 2006 (Administration and Multicultural Committee);
6. Reviewing and revising the facilities master plan in light of evolving circumstances, and prioritizing projects to accommodate the school's programmatic needs (Administration and Buildings and Grounds Committee);
7. Proposing a future expansion of financial aid, funded primarily by a larger endowment, to increase the amount of aid available to middle income earners (Finance Committee);
8. Developing a plan for continued robust annual giving and future capital needs (Development Committee).

## STRATEGIC PLANNING COMMITTEE MEMBERS

### **Steering Committee**

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 Renée Landers  
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