



T H E A C A D E M Y
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A R T S & S C I E N C E S

Strategic Planning Initiative 2005-2010

Strategic Goals, Objectives and Tactics

Prepared by
Board of Directors
South Baldwin Children's Foundation, Inc.

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With assistance & consultation provided by ISPG (Independent School Performance Group)

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A SPECIAL MESSAGE FROM THE BOARD CHAIR, Chris Nelson

As the Board of Directors for the South Baldwin Children’s Foundation we made the decision to develop this Strategic Plan with the help of professional consultants in independent school development. It was and remains our opinion that this school cannot reach its potential without a well crafted plan and a determined execution thereof. Every parent is a part of a constituency. We are the “School Community” which is mentioned several times in this document. As you read this document, please be critical in your thinking. However, also keep in mind that this is a plan for the next five years – in reality the immediate future. Your suggestions and input are vital to the execution of the Plan. To that end, it is the Board’s intention that this document will not be the final blueprint for our journey, but rather a roadmap to the future – a living document - which will be amended, as appropriate, during the trip.

What we have before us is, truly, the rarest of opportunities to be involved with the creation of a legacy – one that will change the character of our community-at-large for ever.

As Board members, it is this reality that drives our passion for ensuring that the Academy receives every advantage for maximizing its potential – similar to how we all view the need for the best possible opportunity for our children.

I look forward to working closely with each of you, as Foundation President, Board Chairman, parent and friend to ensure that we, as a community, look back with pride at what we started in 2005.

VISION

The Academy of Arts and Sciences will be the leading pre-school to 8th grade educational institution in Baldwin County and its curriculum, faculty, and facilities will be unsurpassed.

MISSION

The mission of The Academy of Arts of Sciences is to provide an unsurpassed educational experience. The Academy is committed to an environment that fosters excellence in teaching and learning; curricular change and innovation; and participation in the civic matters of our community, our state, our nation, and our world. The Academy strives to nurture the individuality, creativity, talent, and character within each child in the pursuit of success.

VALUES STATEMENT

The traditional disciplines of Language Arts, Mathematics, Science, and Social Studies form the core of our academic program. Because we seek to educate the whole child, the school is also committed to a vital arts program, Spanish program, and music program. Our teaching is spirited and promotes active learning. We provide experiences, which are sensitive to different learning styles and stages of development. We guide students to discover their own strengths and develop confidence in their abilities to learn. Our program is rich, flexible, and individualized, offering many pathways to success.

We encourage close relationships between students and teachers and cooperation between home and school to foster a feeling of family. In addition, we strive to provide open lines of communication between not only parents and the teachers, but also parents and the governing Board. We believe that parents are an essential part of the educational process and we encourage every parent to take an active role in it. We recognize our responsibility to prepare students to meet not just academic challenges, but personal and ethical ones as well. Our faculty provides leadership, fosters character development, and instills strong values such as honesty, integrity, and respect as they guide students toward self-reliance. We encourage our students to look beyond themselves, to work cooperatively with others, and to serve their communities and the larger world. We expect much of our students, because we believe that they have much to give.

As we honor creativity, sense of wonder and exuberance in childhood, we hope to stir in our students enthusiasm for learning as an exciting, lifelong activity. We work to equip each student with a solid mastery of essential skills, healthy self-esteem, and a clear sense of values. At the Academy of Arts and Sciences, we strive to empower young people to reach their highest, not only in school, but also in life.

STATEMENT ON DIVERSITY

A diverse student enrollment and a curriculum that stirs appreciation for various cultures, including one's own, are important for the fulfillment of the Academy's mission. It is our intention to foster in our students both respect for individual and cultural differences and understanding of our common humanity, as to prepare them to assume their responsibility as Americans and citizens of the world. The Academy of Arts and Sciences admits students without regard to sex, race, color, religion, national or ethnic origin to all the rights, privileges, programs and activities made available to the student body.

STRATEGIC PLANNING PROCESS

The Board of Directors of the South Baldwin Children's Foundation, a non-profit society that was founded to raise funds for a school where the members' children were enrolled, made a decision to take over operations of the school when the previous operator undertook closure of the school. After securing funding to purchase the real estate that the school was located on, the Board of Directors searched for a resource that could assist them in the planning for the future of the school.

This Strategic Plan was created through a process facilitated by the Independent School Performance Group Inc. in consultation with school families, staff and faculty, school administration, the school's Parent Association, and the Board of Directors. The data used in this process was collected both in person during community meetings and via email, fax and other means and will be used to shape the operational direction for each of the next five years.

There have been three phases to the Strategic planning Initiative. First, extensive research was undertaken to clarify and understand both our external environment (industry, market demographics and competitive analysis) and our internal environment (the needs and influence of major stakeholder groups, our core competencies, financial performance and school development strategies.) Second, Strategic Planning dialogue and focus groups were constituted from among faculty, administration, Board and parents to oversee the strategic planning process with guidance and direction from ISPG retained as our planning consultant. Third, the tactical planning phase was initiated. The Strategic Planning Initiative has been an inclusive, consultative process. The format of this Strategic Plan is as follows:

Strategic Goals – High level statements of what outcome is needed.

Objectives – Statements of what will be accomplished.

Tactics – Actions that will be taken to attain an objective.

Strategic Goal #1:

The Academy of Arts and Sciences will be serving the needs of the students in South Baldwin County from Pre-school through 8th grade.

Objective 1.1: Gain accreditation from the International Baccalaureate Organization for the Primary Years Program

Tactics: Commence application process and professional development to achieve IB Candidate status in 2006. Appendix B details the Education Plan including IB process.

Objective 1.2: Hire a Head of School (Principal) that will support The Academy's vision and goals for the future as established by the Board.

Tactics:

- Survey school community on desirable qualities and qualifications of candidate (December 2005)
- Strike "Head" Search committee (January 2006)
- Develop Head contract and job description (January 2006)
- Initiate Head search
- Advertise initially in Alabama and Florida newspapers and on the internet (January 2006)
- Check references and work samples
- Short list appropriate candidates (February 2006)
- On site interviews with appropriate short list candidates (March 2006)
- Contract Head of School for July 1, 2006 (3 year contract)

Objective 1.3: Add an additional Preschool class in 2006/2007.

Tactics

- Secure daycare licensing
- Begin marketing of proposed new preschool class
- Review facilities requirements for additional classroom space
- Review teaching resource and hire accordingly
- Target Mother's Day off and other daycare operators with collateral materials and information about the school
- Posters in community centers, libraries, pediatricians, mother and tot programs and Welcome Wagon (Baby Welcome)

Appendix A details the Marketing Plan for the school to be executed over the next five years.

Objective 1.4: Expand by a grade per year starting with 5th grade in 2006 - 2007 up to 8th grade by 2009/2010.

Tactics

- Begin marketing of proposed 5th grade expansion in early 2006.
 - Review facilities requirements for additional classroom space.
 - Review teaching resource and hire accordingly.
 - Develop collateral materials about upper elementary and middle school grades.
- Appendix A details the Marketing Plan for the school to be executed over the next five years.

Strategic Goal #2:

The Academy's students, faculty, and parents will be regarded as leaders in community service and be considered an integral part of the community.

Objective 2.1: Increase the external presence of the school's students throughout the community.

Tactics

- Each grade picks a community service project for each month
- Develop annual community service award program
- Organize food drives
- Participate in intergenerational activities
- Host various fundraisers
- Develop handbook policy on community behaviors
- Sponsorship of underdeveloped nation school.

Objective 2.2: Increase the external presence of the school's faculty and parents throughout the community.

Tactics

- Student initiated Foundation, mentored by Board member to raise funds for underdeveloped nations' education
 - Membership in local community service organizations such as Chamber of Commerce, Rotary, Lion's, Welcome Wagon, and others
 - Teacher/faculty led outreach
 - Active participation in service organizations' activities and events
 - Seasonal "canned food drives"
 - Humanitarian/hurricane relief programs
 - Fundraisers for scholarship monies to be directed towards tuition for children in the community who qualify to attend the school.
- Appendix E—Fundraising Plan detail initiatives that will assist in meeting this objective.

Objective 2.3: Offer the school facility to be recognized as one of the disaster relief centers in the local community.

Tactics

- Review local community guidelines for disaster relief centers
- Develop an emergency preparedness policy and plan for the school
- Increase emergency medical training for faculty and staff as part of professional development.

Objective 2.4: Make the school facilities available for local community use after school hours.

Tactics

Offer facilities to eagle scouts, girl guides, seniors' bridge clubs, etc.

Strategic Goal #3:

The Academy will reach enrollment of 175 students and will look to expand to new state-of-the-art facilities.

Objective 3.1: Have 115 students enrolled in 2006/2007, 145 students enrolled in 2007/2008, 160 students enrolled in 2008/2009, 175 students enrolled in 2009/2010

Tactics

- Refine admissions process; develop admissions package (including electronic version on website); annually develop marketing calendar of events; marketing for enrollment; define key messaging as indicated within Appendix A—Marketing Plan; conduct annual research activities including family survey, focus groups, area school analysis and association data; Head of School assigned to prioritize admissions inquiries and enrollment growth; establish tuition assistance program; evaluate The Academy in line with the eight sustainability indicators provided by ISPG in Appendix A—Marketing Plan.

Strategic Goal #4:

The Academy's faculty and staff will be the best-trained and educated group in the area.

Objective 4.1: We will encourage and support a robust professional development program for faculty and staff.

Tactics

- Pursue various certification and accreditation opportunities (International Baccalaureate, National Board Certification for professional teaching standards)
- Develop a program to have all faculty advance their degree qualifications to the level of Masters degree
- Promote recognition opportunities that will establish particular faculty members as experts in their respective field of study (speaking engagements, published papers, articles)

Objective 4.2: Recruit qualified and certified specialist teachers who are familiar with the independent school model.

Tactics

- Set aside budget to advertise for faculty and staff in media (beyond word of mouth and referral); make application process for employment at The Academy evident on the school website

Objective 4.3: To retain and attract certified, qualified staff and faculty.

Tactics

- Offer a progressive compensation package; establish a highly competitive employee benefits package
- Offer a number of professional development opportunities; annually survey staff and faculty on their job satisfaction
- Annually evaluate staff and faculty on performance; feature faculty testimonials in collateral materials; highlight the preferred work environment at The Academy of Arts and Sciences; institute new faculty orientation process; develop a program to celebrate faculty and staff achievement

Strategic Goal #5:

The Academy will be debt free and revenues exceed expenditures.

Objective 5.1: We will develop an integrated financial operating plan detailing how and when this strategic goal will be achieved.

Tactics

- Define and achieve appropriate enrollment levels
- Refine existing tuition and fee structure
- Maintain affordability and accessibility
- Implement diverse payment policy, including pre-payment incentives, sibling discount, credit provision and pre-authorized direct payments
- Streamline the billing process without additional administrative requirements or costs
- Refine the collections process
- Annually review expenditures and supplier relationships
- Balance the use of internal resources with external expertise to achieve cost savings and economies of scale.

Objective 5.2: Develop a capital strategy inclusive of a fundraising and philanthropy structure that will address the school's needs over the next five years.

Tactics: Develop external and Internal fundraising initiatives to increase revenue and build community with consideration to the best return on time and resources invested.

1. Internal fundraisers (events and sales); one major event per term led by parent volunteers in harmony with designated task force or committee
 - Island Affair Auction Gala—March annually
 - Fall Fair Event
 - School sponsored Guest speaker evenings to raise awareness, build community and generate some fundraising
2. External fundraisers; corporate style Golf Tournament (summer)
3. Planned Giving/Philanthropy: Capital Campaigns and Annual Campaigns
4. Founders Loans
5. Parent Equity Bonds

PERFORMANCE MEASURES

Objective 1.1

- IB application completed by June 2006 with the balance of Education appendix

Objective 1.2

- Survey school community on desirable qualities and qualifications of candidate during December 2005
- Strike "Head" Search committee early January 2006
- Develop Head contract and job description in January 2006
- Initiate Head search
- Advertise initially in Alabama and Florida newspapers and on the internet during January 2006
- Check references and work samples
- Short list appropriate candidates in February 2006
- On site interviews with appropriate short list candidates in March 2006
- Contract Head of School for July 1, 2006 (3 year contract)

Objective 1.3

- Add additional preschool class with daycare licensing by June 30, 2006
- Marketing initiative targeting preschool by April 2006 with facility ready and teaching resource contracted by July 30, 2006

Objective 1.4

- Facility decision made by April 1, 2006 for addition of grade 5 for 2006/2007 school year; with facility ready by July 30, 2006 and teaching resource contracted by August 1, 2006
- Facility decision made by April 1, 2007 for addition of grade 6 for 2007/2008 school year; with facility ready by July 30, 2007 and teaching resource contracted by August 1, 2007
- Facility decision made by April 1, 2008 for addition of grade 7 for 2008/2009 school year; with facility ready by July 30, 2008 and teaching resource contracted by August 1, 2008
- Facility decision made by April 1, 2006 for addition of grade 8 for 2009/2010 school year; with facility ready by July 30, 2009 and teaching resource contracted by August 1, 2009

PERFORMANCE MEASURES (continued)

Objective 2.1

- Annual review of community service calendar and Community Service Award Program developed by December 2006

Objective 2.2

- Student initiated Foundation establish by December 2007
- Membership in local community service organizations April 30, 2006
- Fundraisers for scholarship monies established by June 30, 2007

Objective 2.3

- Develop an emergency preparedness policy and plan for the school by January 2006
- Review local community guidelines for disaster relief by March 2007
- Increase medical training for faculty and staff for June 2007

Objective 2.4

- Facilities offered to local community groups by March 2006

Objective 3.1

- Refine admissions process by January 2006
- Admissions package complete by February 2006
- Marketing calendar finalized by June 30 annually for the following year
- Establish tuition assistance program by February 2006

Objective 4.1

- Education Committee to make recommendations by June 30, 2006 on certification and accreditation opportunities for faculty and staff
- By December 30, 2006 the Board to announce certification and accreditation opportunities
- Develop a program by December 2007 to help staff and faculty to advance their degree
- Promote professional recognition opportunities by June 30, 2008

Objective 4.2

- Annual budgeting inclusion of line item for recruitment advertising
- Make application process for employment available through the school website by January 2006

Objective 4.3

- Offer a competitive compensation package by March 2006
- Employee benefits package established by June 30, 2006
- Annually survey staff on job satisfaction during December of each year
- Head of School to evaluate staff annually
- New faculty orientation process developed by August 2006
- A program to celebrate faculty and staff achievements developed by June 2007

PERFORMANCE MEASURES (continued)

Objective 5.1

- Define appropriate annual enrollment levels by January 2006
- Refine existing tuition and fee structure by June 2006
- Implement diverse payment policy by February 28, 2006
- Streamline billing process by January 2006
- Refine the collections process by January 2006
- Annually review expenditures each October for previous year

Objective 5.2

- Fundraising: corporate style golf tournament for May 2007
- Planned giving/philanthropy: annual appeal designed by November each year
- Capital campaign commenced three years prior to expenditure or retirement of all debt
- Founders Loans secured in the amount of \$300,000 by June 2006
- Parent equity bonds commenced by no later than March 2006 for August 2007 implementation.

Appendix A: Marketing Plan

Appendix B: Education Plan

Appendix C: Facilities Plan

Appendix D: Financial Plan

Appendix E: Fundraising Plan