



Saratoga  
Independent  
School

Inspire Today. Prepare for Tomorrow.

# SARATOGA INDEPENDENT SCHOOL STRATEGIC PLAN 2020 – 2025

## Mission Statement

The mission of Saratoga Independent School is to empower students to be curious and confident learners, capable of critical thinking, problem solving, teamwork, and articulate expression. As an inclusive, nurturing community that values diversity and mutual respect, we strive to cultivate in our students the knowledge, skills, work ethic, and character to lead purposeful, healthy lives.

Beginning with a Board of Trustees retreat in January 2019, the stakeholders of Saratoga Independent School (S.I.S.), have worked diligently to thoughtfully review, assess and create a strategic plan that will help solidify S.I.S.'s position as the premiere and only independent (non-affiliated) private school in Saratoga County. Through a multi-phase process engaging S.I.S. stakeholders, which include the Board of Trustees, faculty, staff, we have come up with 6 key areas to enhance, strengthen and improve our school. Within each key area we have created 4-6 action steps, which will be broken down into two sections: those to focus on within the next 18 months (2020-2021) and those to accomplish in the next 3 to 5 years (2022-2025).

We began this process by revisiting the most recent Strategic Plan from 2015, providing a detailed review, with an acknowledgement of our accomplishments, as well as identification of items that still need to be addressed. We will revisit a number of the unfinished items by including them in this Plan. One significant occurrence that has since influenced this plan, is the events surrounding the coronavirus pandemic (COVID-19) which has drastically changed the landscape of education as we knew it and our situation is continually being modified with daily updates and speculation of new-norms.

Even in these challenging times, it is important to maintain our ambitious, yet attainable goals, with the aim to strengthen and solidify our position as the premiere & only independent school in Saratoga County. We continue to strive in the spirit of our school's motto:

**“We take care of ourselves,  
each other, our school,  
and our community.”**

**- S.I.S. School Motto**

The Strategic Planning Committee, with the help of additional stakeholders, further developed the six strategic areas, incorporating actionable steps for each. In July 2020 the Board of Trustees approved the plan. As the Saratoga Independent School approaches its 30<sup>th</sup> anniversary (2021), this strategic plan will serve as a guiding road map for the future.



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We have identified the following six key areas as the focus of the strategic plan:

**1. Campus Plan: Facilities Master Plan & Unified Campus –**

Create a master plan that encompasses the entire campus with a unified vision, including updated safety and security; the construction of a third building; as well as a detailed, sensible and appropriate use of space/vision for PreK through 8<sup>th</sup> programmatic needs.

**2. Community Relationships: Internal & External**

Engage with current stakeholders (parents, students, faculty and staff) and the greater Saratoga community to promote retention & boost recruitment; collaborate with external community organizations to enhance student experience, promote S.I.S.'s unique educational offering, and support diversity and inclusion; expand brand awareness and positive perception of S.I.S. through dedicated use by all internal stakeholders of the new “elevator pitch” based on recent market research; communicate the new Staff Organizational Chart; and explore the potential of a new school name.

**3. Curriculum and Programming**

Assess current curriculum to ensure school curriculum and programming uphold academic excellence; develop a plan to fulfill physical programmatic needs as the school grows; ensure opportunity for diverse opinions and inclusive dialogue; provide resources to encourage professional development and continuing education of teachers; maintain the values, culture and uniqueness of the school.

**4. Financial Health**

Create and maintain a healthy operating budget with objective of consistent growth; review Staff Organizational structure, wages and building mortgages; foster and expand donor cultivation; and establish an Endowment Fund.

**5. Human Resources**

Develop a Head of School succession plan as well as a plan for increased administrative support; review job descriptions and create a Staff Organizational Chart; increase teacher development opportunities; offer competitive wages.

**6. Technology/IT**

Enhance safety & security; develop on-line curriculum to provide consistency with virtual classrooms for at-home schooling (on-line teaching platforms, educational resources, etc.); launch protocols and internal systems to enhance human resources; and establish a more robust and user-friendly communication platform for both internal & external marketing to boost recruitment and retention. (Tech/IT intersects and overlaps with the needs of a number of the other key Strategic Areas.)



## STRATEGIC AREA I

### Campus Plan: Facilities Master Plan & Unified Campus

**Goal:** Create a master plan that encompasses the entire campus with a unified vision, including updated safety and security; the construction of a third building; as well as a detailed, sensible and appropriate use of space/vision for PreK through 8<sup>th</sup> programmatic needs.

#### Area Leaders:

*Oversight:* Facilities Committee

*Implementation:* Director of Operations & Director of Finance

#### Actionable Steps:

##### Short-Term (2020-2021)

1. Update all safety & security protocols, including state of the art technology & cameras, means of egress/doors, phone/PA system; as well as the new-norms in regard to COVID related health measures and policies based upon the guidance of the CDC and NYS regulations when/if the students return to the school in September 2020.
2. Finish the fit-out of 2<sup>nd</sup> floor academic space including the science lab, art room and library to be completed by the first year with a full Middle School 6<sup>th</sup>-8<sup>th</sup> graders (August 31, 2020).
3. Analyze and implement an overarching plan for the school as a whole, that best utilizes all interior spaces, clearly defining and unifying both the “old” and “new” wings creating a detailed, sensible and effective use of space based on PreK through 8<sup>th</sup> programmatic needs, to enhance daily operations for faculty and students. Assessing the use of classrooms and shared spaces such as library, science lab, art room(s), cafeteria space, computer lab(s), break out rooms, etc.
4. Create a campus plan that supports & reflects the above interior modifications relative to their exterior/outdoor counterparts. Specifically taking into consideration the potential relocation of PreK playground, K-5 playground & sledding hill, athletic fields, and means of egress to said outdoor playground spaces / playground & athletic fields.

##### Long-Term (accomplished by 2025)

1. Continually assess and maintain the school’s aging infrastructure; evaluating and anticipating future repairs & upgrades
2. Create a master plan that encompasses the entire campus with a unified vision, including acquiring the adjacent properties to provide access for a second exit to enhance the school’s safety and security, as a secondary means of egress to Lake Avenue.
3. Revisit the feasibility of building a third building that could encompass at least two out of three needs: Gymnasium (PE: gross-motor skills, Sports: basketball), Auditorium (Theatre productions, Music concerts, STEM competitions), Cafeteria.



## STRATEGIC AREA II

### Community Relationships: Internal & External

**Goals:** Engage with current stakeholders (parents, students, faculty and staff) and the greater Saratoga community to promote retention & boost recruitment; collaborate with external community organizations to enhance student experience, promote S.I.S.'s unique educational offering, and support diversity and inclusion; expand brand awareness and positive perception of S.I.S. through dedicated use by all internal stakeholders of the new "elevator pitch" based on recent market research; communicate the new Staff Organizational Chart; and explore the potential of a new school name.

#### **Area Leaders:**

*Oversight:* Marketing Committee

*Implementation:* Director of Marketing

#### **Actionable Steps:**

##### **Short-Term (2020-2021)**

1. Engage with current stakeholders (faculty, staff, students, parents, grandparents, alumni, Board of Trustees and donors) to promote retention & boost recruitment.
  - a. Retention: Continue the consistent implementation and refinement of school events and traditions
  - b. Recruitment: Increase S.I.S.'s profile in the community through engagement with local community organizations, businesses, programming, and leaders
  - c. Work with the Facilities Committee & IT consultant to continually assess communication tools to enhance confidence in the school's administration (student school supplies, summer reading/work, apps, FACTS, 10 Marks, etc.)
2. Expand brand awareness and positive perception of S.I.S. through dedicated use of the new "elevator pitch" by all internal stakeholders, including administration, faculty, staff, Board of Trustees, and Parent Association.
3. Communicate the new Staff Organizational Chart to clarify roles and responsibilities that will in turn encourage clear communication and positive relationships,
  - a. Based on the new Staff Organizational Chart, provide job descriptions to faculty and staff that accurately represent the chain of command and reporting structure of the organization.
  - b. Based on the new Staff Organizational Chart, provide parents with clear direction on which staff person (administrator or teacher) to contact for different issues or concerns (possibly create a directory on Facts)
4. To enhance recruitment efforts, focus a portion of our marketing on our successful implementation of virtual classrooms, physical plant modifications, and adaptive methods of teaching reimagined for the changing needs and requirements of a world in the midst of a pandemic.



## STRATEGIC AREA II

### Community Relationships: Internal & External

#### Long-Term (accomplished by 2025)

1. Explore the potential of a new school name to strengthen our brand and clarify positioning within the broader community as a secular PreK-8<sup>th</sup> private day-school.
2. Pursue relationships with external community organizations in the broader Saratoga community to find areas of programming overlap and partnership and create meaningful collaborations that will boost retention and recruitment efforts. Specific areas and organizations include but are not limited to:
  - a. Athletics & Sports partners: Saratoga Rowing Association (SRA), Saratoga & Wilton YMCA.
  - b. Arts partners: Saratoga Children's Choir, Saratoga Children's Theater (SCT), Saratoga Performing Arts Center (SPAC), Saratoga Shakespeare Co., National Museum of Dance, Universal Preservation Hall, Albany Symphony, and Tang Museum.
  - c. Educational partners: Global Foundries, Rensselaer Polytechnic Institute (RPI), Skidmore College, Union College, Saratoga?
  - d. Environmental partners: Saratoga Farmers Market, Pitney Meadows Community Farm, Saratoga PLAN (*i.e. Middle School students can perform community service on the Bog Meadow trail adjacent to our property*).
  - e. Internship partnerships, for 8<sup>th</sup> graders, at any of the above organizations.
3. Continue to advance and support the Diversity and Inclusion committee to initially increase professional development and advance diversity & inclusion curriculum in PreK-8<sup>th</sup> with a goal of identifying and creating, either through internal advancement or an external hire, a staffing position to focus on diversity & inclusion (*i.e. adding a Diversity & Inclusion Liaison to the Board or a staff member who receives a stipend for this additional work*).
  - a. Expand equity and advocacy financial aid;
  - b. Pursue external community relationships with diverse organizations or a partnership with a more diverse school such as KIPP, Skidmore, etc.



## STRATEGIC AREA III

### Curriculum and Programming

**Goals:** Assess current curriculum to ensure school curriculum and programming uphold academic excellence; develop a plan to fulfill physical programmatic needs as the school grows; ensure opportunity for diverse opinions and inclusive dialogue; provide resources to encourage professional development and continuing education of teachers; maintain the values, culture and uniqueness of the school.

#### Area Leaders:

*Oversight:* Head of School

*Implementation:* Middle School Director and Curriculum & Student Services Director

#### Actionable Steps:

##### Short-Term (2020-2021)

1. Assess current curriculum school-wide to ensure school curriculum and programming uphold academic excellence (Pre-K through 8<sup>th</sup>).
  - a. Review & evaluate current programs Kindergarten through 5<sup>th</sup> grades including, but not limited to, Columbia's Teachers College Writing & Reading program, Singapore math, responsive classrooms, thematic learning and multiage classrooms.
  - b. Identify & clarify unique programs for each Middle School grade and work with the Marketing committee to promote (*for example: 6<sup>th</sup> grade – Research, 7<sup>th</sup> grade – STEM / Science fair, 8<sup>th</sup> grade – community service / internship program*).
  - c. Create appropriate curriculum maps based on above analysis.
2. Work closely with Facilities Committee & IT consultant to create a plan to that fulfills the physical programmatic needs by implementing a campus plan with a unified vision PreK-8<sup>th</sup> grade, including assessing the usage of "shared spaces" such as the cafeteria, library, computer lab, science lab, art room, playground(s) and fields.
  - a. Upgrade equipment and repurpose spaces based on above analysis.
3. Provide opportunities for professional development via workshops and other training opportunities, including curriculum writing, new teacher training and administrative strategies (*including but not limited to free training from local non-profits or experts in key areas*).



## STRATEGIC AREA III

### Curriculum and Programming

#### Long-Term (accomplished by 2025)

1. Develop curriculum program enhancements across all grades focusing on the following areas: music, art, theatre, athletics and STEM.
2. Continue to advance and support the Diversity and Inclusion Committee to initially increase professional development and subsequently advance diversity & inclusion curriculum PreK-8<sup>th</sup> with the intent to identify and create, either through internal advancement or an external hire, a staffing position to focus on diversity & inclusion.
3. Based on the Diversity and Inclusion Committee's input, reach out to and build relationships with external community organizations including: KIPP, Skidmore, etc.
4. Work with the Finance Committee to review the financial aid policies, specifically in relationship with equity and advocacy issues.





## STRATEGIC AREA IV

### Financial Health

**Goals:** Create and maintain a healthy operating budget with objective of consistent growth; review Staff Organizational structure, wages and building mortgages; foster and expand donor cultivation; and establish an Endowment Fund.

#### Area Leaders:

*Oversight:* Finance Committee & Development Committee

*Implementation:* Director of Finance, Director of Operations & Director of Development

#### Actionable Steps:

##### Short-Term (2020-2021)

1. Create and maintain a healthy operating budget, by working with the Marketing Committee and Admission Liaison on recruitment and retention efforts to assist in growing and maintaining a healthy enrollment, to keep-on as many current staff as possible as well as make way for short-term hiring needs.
2. Review organizational structure & expanding staffing needs, specifically within the school's finance department. Potential near-term hires may include:
  - a. Additional part-time Middle School teacher(s) for the addition of an 8<sup>th</sup> grade.
  - b. Evaluate the role of the Director of Finance whether this should be a part-time, three-quarter time or full-time position as well as looking at the potential need for a bookkeeper/finance associate to work directly with the Director of Finance.
  - c. An Information Technology coordinator (*or identify a current staff member who is knowledgeable in IT and receives a stipend for this additional work*).
3. Revisit and possibly refinance building mortgages.



## STRATEGIC AREA IV

### Financial Health

#### Long-Term (accomplished by 2025)

1. Create and maintain a healthy operating budget including cash reserves, sustainable Financial aid scholarship program, plan and process, provide resources to encourage professional development and continuing education of teachers, and make way for short-term hiring needs.
2. Work with the Governance Committee to review faculty and staff wages and make adjustments/increases in salaries and benefits.
  - a. Offer competitive wages and benefits, based on the above analysis.
3. Continue to evaluate whether we offer the proper amount of financial aid based on peers and private school norms.
4. Development & Marketing Committees work together to enhance donor cultivation including current parents/family giving, alumni giving/alumni engagement, active and generous alumni association, and foster community partnerships.
5. Review organizational structure & expanding staffing needs to help prioritize other hiring needs throughout the school such as an Information Technology coordinator, a Diversity & Inclusion coordinator, and an Assistant Head of School.
6. Partner with the Governance Committee on the Head of School Succession Plan.
7. Build an Endowment to encompass Financial aid, capital improvements, as well as provide for emergencies due to the old wing's aging infrastructure.
8. Work with the Facilities Committee in assessing the feasibility of building a third building, which would fulfill at least two of the three following needs: gymnasium, auditorium and/or cafeteria, with the understanding that this construction project would most likely require launching a Capital Campaign.



## STRATEGIC AREA V

### Human Resources

**Goal:** Develop a Head of School succession plan as well as a plan for increased administrative support; review job descriptions and create a Staff Organizational Chart; increase teacher development opportunities; offer competitive wages.

#### Area Leaders:

*Oversight:* Executive Committee & Governance Committee

*Implementation:* Head of School & Director of Operations

#### Actionable Steps:

##### Short-Term (2020-2021)

1. Create an Emergency Succession Plan for the Head of School, Directors, and key staff members so the school continues to run smoothly in times of emergency.
2. Review the organizational structure & expanded staffing needs. Create an organizational chart that reflects the current staff roles as well as provides opportunities for internal advancement, growth and future hires, with our immediate needs:
  - a. Hire a part-time bookkeeper/finance associate to work directly with the Director of Finance.
  - b. Hire a part-time 8<sup>th</sup> grade teacher to complete the Middle School.
3. Ensure job descriptions are prepared and up-to-date to solidify and clearly define the internal reporting structure.
4. Provide opportunities for professional development via workshops and other training opportunities, including curriculum writing, new teacher training, and administrative strategies.
5. Ensure that the Head of School has created and is maintaining an annual written evaluation system for all faculty and staff.

##### Long-Term (accomplished by 2025)

1. Work with the Finance Committee to review faculty and staff wages and make adjustments/increases in salaries and benefits.
  - a. Offer competitive wages and benefits, based on the above analysis.
2. Review the organizational structure and expanded staffing needs, including but not limited to, an Information Technology coordinator, a Diversity & Inclusion coordinator, and an Assistant Head of School, while considering the overall diversity of faculty and staff.
3. Create a Long-Range Succession Plan to maintain a smooth and seamless transition of leadership for the Head of School.



## STRATEGIC AREA VI

### Technology/IT

**Goals:** Enhance safety & security, develop on-line curriculum to provide consistency with virtual classrooms for at-home schooling (on-line teaching platforms, educational resources, etc.), launch protocols and internal systems to enhance human resources, and establish a more robust and user-friendly communication platform for both internal & external marketing to boost recruitment and retention. (Tech/IT intersects and overlaps with the needs of a number of the other key Strategic Areas.)

#### **Area Leaders:**

*Oversight:* Facilities Committee

*Implementation:* Director of Operations

#### **Actionable Steps:**

##### **Short-Term (2020-2021)**

1. Identify, nominate and on-Board two to three new Trustees who have expertise in IT and/or a background in facilities.
2. Hire a consultant to evaluate our IT needs and help write a plan that we can implement.
3. The IT Plan should include, but not be limited to, the following items:
  - a. Safety & Security: State of the art technology & cameras, means of egress/doors, Phone/PA system.
  - b. Virtual classrooms: On-line learning, virtual partnerships, summer school.
  - c. Curriculum Program Enhancements: IT/STEM.

##### **Long-Term (accomplished by 2025)**

1. Hire an IT/TECH specialist to oversee all technical needs.
2. Work with Marketing committee to evaluate apps/tech to support positive communication between:
  - a. faculty/staff/administrations
  - b. teachers/parents
  - c. administration/parents.

