

# The Saratoga Independent School Strategic Plan 2016-2020



Soaring to New Heights

## Thinking Ahead Strategically & Remaining True to Our Mission



Since the summer of 2014, the Board of Trustees and staff have been working to create a strategic plan to help ensure the Saratoga Independent School continues to grow and develop as a unique, multi-age school focused on the entire child. Our ambitious, yet attainable, goals aim to strengthen our school, while staying true to our mission and the hallmarks of a Saratoga Independent School education: multi-age, thematic-based, critical thinking, taking care of others, and community building. To accomplish our strategic goals, we will invest in our educators, programming, and facilities to help ensure we are prepared and continue to prepare our students to meet the challenges of the future.

We conducted a community outreach phase from the fall of 2014 into the winter of 2015. There were 2 primary elements of this phase: 1) an online survey and 2) focus groups. During this phase we sought input from staff, parents and the Board of Trustees regarding the school's strengths, weaknesses, and potential strategic priorities.

### Our Mission

***To empower each student to become a confident learner who is capable of critical thinking, problem solving and teamwork.***

In the winter of 2015, after considering the survey and focus group data, as well as additional internal environment information (such as student exits and school financial trends) and external environment information (such as the economic outlook and trends in independent school education), the Board of Trustees, including the Director of School and Director of Development, held a strategic planning retreat. The retreat culminated in the Board of Trustees selecting the following five key areas as the focus of the strategic plan:

- 1) **Physical Expansion** – Build an additional wing while continuing to ensure that the school is building in a fiscally responsible way (including the implementation of a capital campaign).
- 2) **Student Recruitment & Retention** – Enhance understanding of and develop and implement plans for increased, appropriate recruitment & retention of students.
- 3) **Human Resources** - Develop a Director of School succession plan and organizational chart consistent with growth; increase teacher development opportunities; review teachers' pay and make adjustments where possible.
- 4) **Academic Curriculum Enhancements** (as determined by Director of School & teachers) – Develop plan to ensure school curriculum & programming, maintain the culture & uniqueness of the school, and continue to nurture the school's values as the school grows.
- 5) **Expand the school to include a 7<sup>th</sup> & 8<sup>th</sup> grade** - with a target to add the first 7<sup>th</sup> grade class in the academic year 2019-2020, if feasible. A future Saratoga Independent School Board of Trustees will monitor progress towards meeting the 7th/8th grade goal and be responsible for ultimately approving the 7th/8th grade expansion.

The Strategic Planning Committee, with the help of additional stakeholders, further developed the five strategic areas, incorporating actionable steps for each. In June 2015 the Board of Trustees approved the plan. As the Saratoga Independent School approaches its 25<sup>th</sup> year, this strategic plan will serve as a guiding road map for the next 3 to 5 years.



## Strategic Area I Physical Expansion



**Goal:** Build an additional wing while continuing to ensure that the school is building in a fiscally responsible way (including the implementation of a capital campaign).

### **Actionable Steps:**

1. The Construction Management Committee (CMC) will continue to take the lead on the expansion.
2. The CMC, Board of Trustees, and Staff will provide financial oversight.
3. The CMC will develop and implement a communication plan.
4. The school will implement a capital campaign with the goal of raising an amount equal to at least 20% of the debt incurred due to the building expansion.
5. The CMC, Board of Trustees, and Staff will compile and revisit issues, suggestions, and ideas that arise during the expansion but that are not priorities acted on at the time.

## Strategic Area II Student Recruitment & Retention



**Goal:** Enhance understanding of and develop and implement plans for increased, appropriate recruitment & retention of students.

### **Actionable Steps:**

1. Develop a Board task force.
2. Formalize student/family exit interview process, and document current SIS recruitment techniques and student numbers per cohort per year over several years.
3. Research recruitment techniques and retention rates at comparable NYS AIS schools.
4. Determine recruitment & retention goals (understanding that some student exits are appropriate).
5. Develop a plan to reach recruitment and retention goals, suggesting appropriate steps to improve recruitment and retention.

## Strategic Area III Human Resources



**Goal:** Develop Director of School succession plan and organizational chart consistent with growth; increase teacher development opportunities; review teachers' pay and make adjustments where possible.

### **Actionable Steps:**

1. Governance will oversee the organizational structure research (including the data gathering of administrative roles and structures of schools of similar size).
2. Governance will oversee the further development of the existing organizational chart (ensuring proposed clarifications and modifications are consistent with growth, the SIS mission and culture, and NAIS recommendations).
3. Governance will oversee development of a succession plan (consistent with growth, the SIS mission and culture, and NAIS recommendations).
4. Finance will oversee a review of teachers' pay and make corrections, where possible, to ensure pay is equitable (considering factors such as years tenure at SIS and different market rates across disciplines).
5. The Director of School, with Board of Trustees support, will increase teacher development opportunities.

## Strategic Area IV Academic Curriculum Enhancements



**Goal:** Develop plan to ensure school curriculum & programming, maintain the culture & uniqueness of the school, and continue to nurture the school's values as the school grows.

### **Actionable Steps:**

1. Director of School will oversee the academic curriculum enhancements strategic initiative, with the option of creating a committee for support when appropriate.
2. Explore staffing and scheduling models and identify financial parameters needed to ensure that there is ample time for 1) acculturated/experienced teachers to support new staff (particularly with the goal of understanding our culture and approach) and 2) all teachers to collaborate and communicate regularly as necessary for meeting this initiative.
3. Explore staffing and scheduling models to allow the school to balance enhancements to our program, while maintaining the integrity of our core subjects.
4. Teachers and the Director of School will develop a cohesive, scaffolded Language Arts curriculum.
5. Explore the feasibility of creating space and designating time for whole-school events.
6. Explore ways to maintain day-to-day school programming and culture in the face of increased enrollment and separate buildings, and learn from families and students what unique features of our program they would like to see continue as we expand.

## Strategic Area V Establish 7<sup>th</sup>/8<sup>th</sup> Grade



**Goal:** Expand the school to include a 7<sup>th</sup> & 8<sup>th</sup> grade, with a target to add the first 7th grade class in the academic year 2019-2020 if feasible.

### **Actionable Steps:**

1. Create a Board task force, with the Director of School and at least 1 teacher.
2. Determine the requirements for offering an SIS 7<sup>th</sup> and 8<sup>th</sup> grade (e.g., curriculum, # of students, capital costs, cash flow, etc..).
3. Gather data (including from our school community and other schools) to: determine goals (consistent with our mission and culture) for adding a 7th and 8th grade; and, identify the factors that will guide the development of a 7<sup>th</sup>/8<sup>th</sup> grade culture.
4. Research the resources (academic, guidance/support, extra-curricular) needed to offer a high quality 7<sup>th</sup>/8<sup>th</sup> grade (consistent with our school mission and culture).
5. Research the implications, financial and otherwise, for the Pre-K and K-6<sup>th</sup> of the addition of a 7<sup>th</sup>/8<sup>th</sup> grade.
6. Research the internal and external demand for a 7<sup>th</sup>/8<sup>th</sup> grade, attempting to project actual student enrollment (versus expressed interest) for the first 5 years.
7. A future Saratoga Independent School Board of Trustees will monitor progress towards meeting the 7th/8th grade goal and be responsible for ultimately approving the 7th/8th grade expansion by the fall of 2018.

### Strategic Planning Committee

Anne-Marie Campbell, Director of Development  
Michelle Ducrot, Trustee & Parent  
Lance Dunning, Alumnus  
Felice Karlitz, Director of School  
Dennis Kipp, Trustee  
Mary E. Taber, Chair, Trustee & Parent  
Paula Tancredi Penman, Trustee & Parent

**We would like to express our deep appreciation and gratitude to all the people who volunteered in small and enormous ways, and to all the stakeholders who shared their time and ideas throughout the strategic planning process.**



***Saratoga Independent School strives to equip children with the skills and knowledge they need to succeed in an increasingly complex world, while enriching each day of their childhood.***

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