

Seabury School Strategic Plan

Adopted
August 6, 2009

I. Purpose

According to its mission statement,

Seabury School challenges gifted children in a community that cherishes each individual and fosters a love of learning, discovery and creativity.

Vision for Seabury: The Board of Trustees' Vision for Seabury is to accomplish this Mission for a student body that will have grown to two full classes of 16 for each grade from pre-K through 8th, with a talented, stable, enthusiastic, and suitably compensated faculty, in a facility well-suited to its purpose and well-located to serve its market. It will own its facilities and generate surpluses in most years, allowing steady improvement in curriculum, facilities, and provision of financial aid to students. In so doing, Seabury will become the preeminent provider of specialized education for gifted/highly capable students in the South Puget Sound region.

We accept as axiomatic that the strategic plan of Seabury's Board of Trustees is to take the steps required to accomplish the Mission and realize the Vision. Success or failure should be judged by our diligence in executing this strategic plan, and the extent to which Seabury comes to resemble the Seabury described in the Vision, within an appropriate time frame.

II. Initial Assessment of Seabury's Strengths and Weaknesses

Seabury's principal strengths are as follows:

- It serves a clearly defined population.
- It has served that population with demonstrated success for many years.
- It has attracted and retained a capable and energetic director and an enthusiastic, resourceful, and committed faculty and staff.
- It enjoys the good will of its students, their families, alumni, and neighbors.
- Its finances are transparent and robust given suitable enrolment, with modest reliance on fundraising to cover operational expenses.

Seabury's principal weaknesses are as follows:

- Seabury's current physical facilities hamper accomplishment of its mission in respect to current students and cannot accommodate additional classes and grades called for by the Vision.
- Changing economic conditions lead to fluctuations in class size. This in turn can lead to imbalances in sex ratios within specific grades, a need to combine grades, etc.

- Seabury's mortgage is fixed at a relatively high commercial rate and therefore amplifies the financial effects of fluctuating enrollment.
- Seabury's current location is far from much of its prospective market; getting there requires time-consuming travel over surface streets.
- It would be difficult to sell Seabury's current facilities in today's economic conditions, limiting our flexibility in designing this Strategic Plan.
- Seabury's faculty and staff are not yet compensated at targeted levels, based on relevant data.
- Seabury is not currently accredited by PNAIS.
- Seabury lacks consistent, wealthy donors within its community, although a material proportion of its students' families enjoy high and relatively stable current incomes.

III. Broad Goals of the Strategic Plan: 2009-2014

There are many tasks currently performed by Seabury School's faculty, staff, administration, and trustees that are essential to Seabury's strategic success. This Strategic Plan will not focus on existing efforts already a part of Seabury practices and policies. Instead, this Plan will focus on incremental objectives and tasks necessary to move Seabury toward realization of its Vision over the next fourteen years, and more particularly in the next five years through 2014.

Given the Board's view of the school's ~~its~~ strengths and weaknesses, a suitable strategic plan for Seabury consists of seven goals.

The first goal pertains not only to what Seabury School provides, but how Seabury acquires resources it needs to provide it. It is our best means to keep Seabury economically viable; especially when poor economic environments prevail, and must therefore be our most urgent priority:

Goal 1: Increase **enrollment** to Seabury School's full capacity; market and recruit so as to result in waiting lists for enrollment at each grade level.

The next three goals move Seabury School toward provision of an educational experience fully consistent with the Mission and Vision:

Goal 2: Launch a **Middle School** program.

Goal 3: Relocate Seabury School to a suitable **consolidated facility** with the capacity to enroll 320 students from pre-kindergarten through eighth grade.

Goal 4: Attain **accreditation** from Pacific Northwest Accreditation of Independent Schools (PNAIS).

The following two goals pertain to acquisition of the resources that will enable Seabury to realize its Mission and Vision on a sustainable basis:

Goal 5: Expand philanthropic outreach and effectiveness.

Goal 6: Identify and implement **alternative financing** for existing and future facilities.

The last goal introduces a degree of discipline for the Board, faculty, and staff as they execute this plan and seek to ascertain its accomplishments by timelines and design:

Goal 7: Devise and monitor a set of **indicators of progress** toward achieving the goals of the strategic plan.

IV. Discussion of Specific Goals

The balance of this document explains these seven goals of the Strategic Plan. Specific action steps conclude the discussion of each goal and are summarized in Appendix A. A critical path analysis and target dates for accomplishment of these goals is provided in Appendices B and C.

1. Increase enrollment to Seabury School's full capacity. Seabury has demonstrated an ability to accomplish its mission in a fashion highly satisfactory to its students' parents, and generate a surplus applicable to physical and program improvements, with as few as 90-100 students. The school has been able to achieve these levels only intermittently for a number of reasons:

- Seeing few options for middle school, Seabury parents withdraw their children from the school **after 5th grade** to enroll them in schools with middle school options.
- Small **class size** or the resulting **gender imbalances** can create a vicious circle, leading to additional departures for schools that offer richer social experiences.
- Economic uncertainty leads some families to place their children in public schools to eliminate the cost of private education from their family budgets. **Poor economic times** also tend to increase anxiety among board members and faculty, leading to less optimistic assessments of the school's prospects, dampening their effectiveness as marketers and ambassadors of the school. These phenomena subside during periods of general economic expansion.
- Seabury **parents are intensely concerned** with their specific child's school experience, and may be more inclined than typical parents to change schools on the basis of idiosyncratic factors.
- Current **school facilities** allow for a maximum of 100 students, providing only a thin financial margin of safety against enrollment declines.

The fraction of qualified students who are actually enrolled at Seabury is as yet very small. Even if economic conditions shrink the pool of qualified students who have

the resources to attend Seabury, recruitments efforts should be able to increase Seabury's penetration of its potential market enough to realize its Vision and accomplish the first goal of the Strategic Plan.

Per the third goal of the strategic plan, Seabury is committed to opening a non-traditional middle school program for the 2009-2010 school year. This has directly led to the retention of 9-10 students. A consequence of this commitment is higher fixed costs for the combined schools and a consequent need to increase enrollment to meet those expenses.

The middle school will expand Seabury's physical plant, allowing growth of lower grades in the existing facilities. This gives us an opportunity to increase enrollment in grades pre-K through 5, improving Seabury's financial strength and providing a defense against "too-small class syndrome." Recruitment and retention of students in lower grades will be essential to realize these gains.

A continual effort to attract new students and retain existing students is fundamental to Seabury's success. **Cultivation of a culture of recruitment and retention** across all members of the Seabury community is the most direct means to elicit such an effort, and therefore must be our first strategic priority. How best can we bring this culture into being?

PNAIS research indicates that the most powerful marketing tool a private school has is a committed and enthusiastic faculty. Seabury has that! The Board must ensure that the faculty's effectiveness in recruitment and retention is maximized. Accordingly, procedures will be /have been developed as follows:

- Faculty should be made aware of their power as recruiters in every interaction with parents, students and prospects, and instructed on how to make use of that power to draw qualified students to the school.
- The Board must express to faculty and staff a firm commitment to financial stability, program and faculty quality, and a viable strategic plan, so that they may represent the school with conviction and enthusiasm.
- Board members should be alert to negative rumors about the school and have talking points with which to address them. There now is an even bigger need for educating the Board members on ways to be better advocates for the school in small group discussions about rumors and the vision for the school.
- A core parent recruiting and retention committee has been established and is a second critical component of Seabury's recruitment and retention efforts. These parents must be supported with knowledge of the importance of their work, talking points for discussions with other parents and prospective parents of Seabury students, and marketing materials and programs that complement their efforts. The Board should be informed regularly of their progress and take steps necessary to keep this group energized and active.

The Seabury community at large must be reminded repeatedly that recruitment and retention is the first strategic priority in making Seabury the best school possible for

existing as well as prospective students. They must be reminded that Seabury basically is its stakeholders and that the school can realize its potential only by means of efforts they undertake individually and collectively. The Board, the faculty, and the parents committees must develop strategies to reinforce this message at every opportunity.

Specific Action Steps:

- a. The Head annually shall establish suitable recruitment objectives for various members of the Seabury community with respect to building awareness of the School, identifying candidate students, attracting candidates to investigate the school, and realized enrollment increases. The Head shall organize one or more committees to engage parents, faculty and staff in the effort to achieve these objectives, and report their results to the Board on a quarterly basis.
- b. To create a culture of recruitment, the Head shall develop a strategy to remind all members of the Seabury community continually of the importance of their personal recruitment efforts to the health of the School as a whole, and motivate them to continue their efforts actively. Parents in particular must come to realize that it is in the best interests of their Seabury children for all classes to be fully enrolled at all times, and that they personally can and should help bring about that result. The head shall describe a ~~her~~ strategy to the Board annually, survey attitudes toward recruitment semiannually and report survey results to the Board.
- c. To raise awareness of Seabury in its target service area, the Advancement Director and Head shall pursue opportunities to gain press coverage of Seabury programs and events.

2. Launch a Seabury Middle School program. The Board in 2007 committed to the development and launch of a nontraditional Middle School program, encompassing grades 6 through 8. This effort is well underway with the hiring of a Middle School Coordinator for curriculum development and leasing of space from the Knights of Pythias in downtown Tacoma for the school.

This middle school initiative has become imperative. Many students in 5th and 6th grade remain at Seabury in anticipation of enrollment in the Middle School. We must do our best to reward their trust by providing the education they seek. These students would be lost from the school and their families alienated if the middle school program were not launched as anticipated. Seabury would lose credibility and goodwill as a consequence. The Board must ensure that the middle school is launched and ensure that it is provided with resources for at least a period that would allow initial enrollees to complete their middle school years ~~there~~, regardless of

enrollment. An element of Seabury's capital campaign should be to identify contingent funding to back this outcome.

Specific Action Steps:

The Middle School Coordinator and/or Head shall accomplish the following:

- a. Complete development of a compelling and distinctive middle school curriculum that meets the particular needs of gifted middle school students, and exploits the strengths of its chosen location.
- b. Oversee the design and build-out the chosen building space, in time for initial opening in fall, 2009.
- c. Identify suitable Middle School faculty and staff members, to be hired by the Head.
- d. Devise a class schedule to optimize use of Middle School and community resources.
- e. Organize transportation that meets the needs of parents with both middle and lower school students, enables middle school students to access community resources, and provide limited transportation of students between home and school.
- f. In conjunction with school-wide recruitment effort, execute an aggressive recruitment/retention campaign for the Middle School as soon as possible, with a target minimum initial enrollment of 20 in the 6th and 7th grades, 35 students in 6th, 7th, and 8th grades in 2010-2011, and 45 students in 2011-2012.

3. Relocate Seabury School to a suitable consolidated facility. This is the longest-term goal of the Strategic Plan, with some required action steps commencing now, others when the middle school is up and running, and the most labor-intensive steps occurring in 2012 and beyond, when we are confident of the viability of a K-8 program and our ability to grow into a consolidated facility.

A purpose-built or suitably renovated consolidated school in a suitable location is essential to Seabury's long-run viability for a number of reasons:

- It would provide a facility specifically designed to accommodate Seabury's curriculum elements and ancillary activities.
- It would turn Seabury's physical plant from a recruiting obstacle to an enticement to new students.
- It would enable Seabury to operate on a scale that would enhance enrollment stability and financial strength.

Specific Action Steps:

- a. Establish general cost and physical facility parameters. Beyond physical space and equipment requirements, the consolidated campus must be located conveniently for the greatest number of prospective Seabury families and for access to community resources incorporated into Seabury's curriculum. Further, Seabury should be housed in a "building that teaches", by elements incorporated into its design or the history or geography of its location.
- b. Establish an ad-hoc Facilities Committee, consisting of at least two Trustees and the Head, to identify candidate locations for a consolidated campus.
- c. The Facilities Committee shall develop plans for design and construction (or renovation) once the location for the consolidated campus is selected.
- d. Commence construction to allow completion in summer 2020, with the objective of moving into the new facility for the 2020-2021 school year.

4. Expand philanthropic outreach and effectiveness for Seabury School. The Board has determined that Seabury must embark on two campaigns in the next decade; a smaller, initial campaign to fund the establishment of Seabury Middle School, and a larger, second campaign focused on the goal of a permanent consolidated facility in an appropriate permanent location.

A development consultant has been hired to provide training and guidance to staff and Board for the initial campaign, which is under way and is targeted for completion in 2011. Successful launch and continuation of the middle school program will mark the point at which Seabury can put forth a credible case for funding and creation of a consolidated campus serving all grades, pre-K through 8th.

The Board must do contingent planning for the appropriate preparation for and launch of such a campaign. Questions to consider are: When should we declare the middle school program a success? Is it possible to tie the capital campaign in with overall school financing by means of a charitable remainder unitrust structure?

Specific Action Steps:

- a. The Advancement Director, working with a development consultant as appropriate, shall execute the Middle School capital campaign, with a target of raising \$300,000 by June 2011.
- b. The Advancement Director, working with a development consultant as appropriate, shall develop and execute a plan to expand Seabury's giving circle by cultivating new donors.

- c. The Advancement Director shall launch the consolidated campus capital campaign in 2012.
- d. The Advancement Director shall summarize the results of these efforts for the Board Development Committee, as requested but not less than quarterly.

5. Identify and implement alternative financing for existing and future Seabury School facilities. Current financing of the school's physical plant is serviced on a fixed payment schedule regardless of the school's revenue outlook, and must be renegotiated at high commercial rates every few years. A superior strategy would be to link payment of this financing to the fortunes of the school.

Under such an arrangement, Seabury could not be made insolvent by revenue shortfalls and the school's financiers, being akin to equity holders of the school, would enjoy limited returns in lean times, but generous returns in good times for the school itself, with an overall expectation of fair compensation for the use of their funds. This change in financing structure is distinct from attracting pure grants and charitable contributions in that the funder is compensated for the funds invested.

Specific Action Steps:

- a. The Board Finance Committee shall develop and recommend alternative financing structures with the objective of reducing Seabury's reliance on traditional forms of debt.
- b. The Head should consider additional means to generate revenue in ways that are consistent with Seabury's Mission, for example, by selling curriculum materials and lesson plans developed at Seabury.

6. Attain Seabury School accreditation from the Pacific Northwest Accreditation of Independent Schools (PNAIS). Seabury's claim to provide a desirable alternative to public and general population private education for gifted students will be greatly enhanced by accreditation by PNAIS. Furthermore, access to PNAIS resources has been and will continue to make membership and full accreditation by this wonderful organization very beneficial to Seabury.

The Board must remain aware of what is required of it to achieve accreditation, and assign specific responsibilities and deadlines to Trustees and faculty to ensure timely satisfaction of accreditation requirements.

Specific Action Steps:

- a. Establish an ad hoc accreditation committee of Board members to establish oversee execution of a work plan for completion of Board elements of the accreditation process.
- b. Select faculty leaders for completion of staff elements of the accreditation process, and establish a work plan that would allow a successful PNAIS on-site visit in the spring of 2010.
- c. Plan and execute a celebration of the school's twentieth anniversary and successful completion of accreditation process.

7. Establish and monitor a set of progress indicators. Research and business shows that frequent monitoring of ones progress toward a goal is the hallmark of successful and effective programs.

The Board will develop a set of tools and processes that assess progress toward and attainment of Board of Trustee and School objectives. These indictors will form a results-oriented “gauges” to include, but not be limited to, measures of community and school patron satisfaction, mission completion, financial growth and stability, student achievement and satisfaction, and program outcomes.

A review of successful, independent schools and the educational literature on quality schools, in general, repeatedly states the direct relationship between frequent monitoring and goal attainment. PNAIS, NAIS, ISACS, Boardsource, Boardnet and other nonprofit organizations offer a plethora of materials, articles, and resource tools to motivate and help Boards in the creation of indicators and a dashboard for measuring success.

Specific Action Steps:

- a. Form a short-term committee of Board Trustees, school staff, school parents, and community resources to develop a purpose and set of indicators for the Board and school.
- b. Develop or adopt evidence-gathering tools to measure these indicators.
- c. Develop a process to use the findings for goal setting and revision.

Appendix A: Specific Action Steps and Annual Timelines by Goal

Goal	Action Steps	Start Date	End Date
1. Increase enrollment to Seabury's full capacity	a. The Head annually shall establish suitable recruitment objectives for various members of the Seabury community with respect to building awareness of the School, identifying candidate students, attracting candidates to investigate the school, and realized enrollment increases. The Head shall organize one or more committees to engage parents, faculty and staff in the effort to achieve these objectives, and report their results to the Board on a quarterly basis	2009	Ongoing
	b. To create a culture of recruitment, the Head shall develop a strategy to remind all members of the Seabury community continually of the importance of their personal recruitment efforts to the health of the School as a whole, and motivate them to continue their efforts actively. Parents in particular must come to realize that it is in the best interests of their Seabury children for all classes to be fully enrolled at all times, and that they personally can and should help bring about that result.	2009	Ongoing
	c. To raise awareness of Seabury in its target service area, the Advancement Director and Head shall pursue opportunities to gain press coverage of Seabury programs and events.	2009	Ongoing
2. Launch a Middle School program	a. Complete development of a compelling and distinctive middle school curriculum that meets the particular needs of gifted middle school students, and exploits the strengths of its chosen location.	2009	Ongoing
	b. Oversee the design and build-out the chosen building space, in time for initial opening in fall, 2009.	6-09	8-09
	c. Identify suitable Middle School faculty and staff members.	2009	Ongoing
	d. Devise a class schedule to optimize use of Middle School and community resources.	2009	Ongoing
	e. Organize transportation that meets the needs of parents with both middle and lower school students, enables middle school students to access community resources, and provide limited transportation of students between home and school.	2009	Ongoing

Goal	Action Steps	Start Date	End Date
	f. Working in conjunction with school-wide recruitment effort, the MSC shall execute an aggressive recruitment/retention campaign for the Middle School as soon a possible, with a target minimum initial enrollment of 20 in the 6th and 7th grades, 35 students in 6th, 7th, and 8th grades in 2010/2011, and 45 students in 2011/2012.	2009	2012
3. Relocate Seabury to a suitable consolidated facility	a. Establish general cost and physical facility parameters. Beyond physical space and equipment requirements, the consolidated campus must be located conveniently for the greatest number of prospective Seabury families and for access to community resources incorporated into Seabury’s curriculum. Further, Seabury should be housed in a “building that teaches”, by elements incorporated into its design or the history or geography of its location.	2011	2012
	b. Establish an ad-hoc Facilities Committee, consisting of at least two Trustees and the Head, to identify candidate locations for a consolidated campus.	2017	2018
	c. The Facilities Committee shall develop plans for design and construction (or renovation) once the location for the consolidated campus is selected.	2018	2019
	d. Commence construction to allow completion in summer 2020, with the objective of moving into the new facility for the 2020-2021 school year.	2019	2021
4. Expand philanthropic outreach and effectiveness	a. The Advancement Director, working with a development consultant as appropriate, shall execute the Middle School capital campaign, with a target of securing pledges totalling \$300,000 by June 2011.	2009	2011
	b. The Advancement Director, working with a development consultant as appropriate, shall develop and execute a plan to expand Seabury’s giving circle by cultivating new donors.	2009	Ongoing
	c. The Advancement Director shall launch the consolidated campus capital campaign	2012	2018

Goal	Action Steps	Start Date	End Date
4. Expand philanthropic outreach and	a. The Advancement Director shall summarize the results of these efforts for the Board Development Committee, as	2009	Ongoing

<p>effectiveness (Continued)</p>	<p>requested but not less than quarterly. b. The Head shall consider alternative revenue sources compatible with Seabury's Mission.</p>		
<p>5. Identify and implement alternative financing for existing and future facilities</p>	<p>a. The Board Finance Committee shall develop and recommend alternative financing structures with the objective of reducing Seabury's reliance on traditional forms of debt.</p>	<p>2010</p>	<p>2012</p>
<p>6. Attain accreditation by PNAIS</p>	<p>a. Establish an ad-hoc Facilities Committee, consisting of at least two Trustees and the Head, to identify candidate locations for a consolidated campus.</p>	<p>2009</p>	<p>2010</p>
	<p>b. Select faculty leaders for completion of staff elements of the accreditation process, and establish a work plan that would allow a successful PNAIS on-site visit-</p>	<p>2009</p>	<p>2010</p>
	<p>e. Plan and execute a celebration of the school's twentieth anniversary and successful completion of accreditation process.</p>	<p>2009</p>	<p>2010</p>
<p>7. Establish and monitor a set of progress indicators</p>	<p>a. Form a committee of Board Trustees, school staff, school parents, and community resources to develop a purpose and set of indicators for the Board and school.</p>	<p>2010</p>	<p>2011</p>
	<p>b. Develop or adopt evidence-gathering tools to measure these indicators.</p>	<p>2011</p>	<p>2012</p>
	<p>c. Develop a process to use the findings for goal setting and revision.</p>	<p>2014</p>	<p>2015</p>
	<p>d. The Head shall describe a her strategy to the Board annually, survey attitudes toward recruitment semiannually and report survey results to the Board.</p>	<p>2009</p>	<p>Ongoing</p>

