

A Vision for Our Fifth Decade



The Strategic Plan for Houston Academy

May 2012



Table of Contents

Introduction and Process Overview	3
Areas of Study:	
Educational Program	5
Funding	9
Human Resources	12
Marketing and Admissions	15

Dear Members of the Houston Academy community,

Over the past five months, a dedicated group of Board Members, Parents, School Administrators, Faculty, and Students have worked diligently to develop a new Strategic Plan for Houston Academy. In partnership with Ted Lingenheld, consultant with School Strategies and Solutions, we were able to:

- Execute an Online Survey to the HA family for the purpose of receiving feedback and ideas.
- Benchmark HA against 24 NAIS schools with similar demographics in the Southeast
- Visit a progressive and growing independent school in Atlanta.

Through this process, our Committee developed four Sub-Committees to address the needs of HA. The Committees are as Follows:

- Education Committee – Chair - Mary Heersink
- HR Committee – Chair - Scott Applefield
- Marketing Committee – Chair - Katherine Lee
- Funding Committee – Chair - Charles Buntin

The essence of our plan lies in the work that each of the Sub-Committees performed over the past five months. We would like to extend a special thank you to each of our Chairs for their extraordinary commitment to the process. Each has led their respective Committees to produce detailed goals and strategies related to their specific area of study.

The overall goal of our Strategic Plan is to put in place a vision that elevates Houston Academy into one of the top independent schools in the Southeast. Our vision is that the Plan will become a living document with specific goals and strategies inclusive of implementation cost and a timetable. Our committee asks that the Board of Trustees be accountable to the plan and to the timetable, continually updating the HA Family to the progress and implementation of each goal.

As a Committee we came to understand that to achieve certain goals within the plan we must encourage you, the HA Family, to understand the importance of, and support generously our Annual Fund. We believe our plan addresses the

specific needs and desires of our parents and will reflect the value of your investment. We believe the Strategic plan will deliver a product that gives our students a comprehensive 21st Century Education. We believe our plan will stimulate a learning environment that will enable our students the opportunity to be accepted into the best colleges in the country. We believe our plan will lead to an engaging and exciting learning culture that not only will our kids want to be a part of, but also will be a place where the best teachers want to teach. We believe our plan shows a commitment to excellence that we as a HA family desire for our students.

Our Committee asks that you all take the time to study HA's Strategic Plan in the pages below and then join us in the successful implementation of it over the next five years. Again we want to thank Ted Lingenheld for his leadership in navigating us through the process. Also we extend a sincere thank you to our entire committee for the numerous meetings each attended and for their valued perspectives and opinions throughout the process.

Mark Saliba
Board of Trustees Chairman

Clay Adams, HA '92
Trustee and Strategic
Planning Chair

Educational Program

Committee Members: Mary Heersink, Chair; Thomas Bailey '12, Dr. Michelle Freeman, Christopher Johnson '12, Kara Johnson, Beryle Ponce, Dr. Daniel Seaton, Col. Chris Sullivan, Cheryl Walker, Melanie Woodcock

- I. Build on our school's traditional core curriculum by focusing on the skill sets needed in the 21st Century: Creativity, Collaboration, Communication, Critical Thinking, and Character.
- II. Utilize **Technology** as the essential, transformational tool of the digital age.
 - a. Rationale: This technology initiative will make computers universally accessible and will integrate them into the curriculum, the two bases of any successful implementation of technology in the classroom; and will place Houston Academy at the forefront as education at all levels quickly adapts to the digital era.
 - b. Become an **Apple School**
 - i. Install campus-wide wireless connectivity for faculty and students.
 - ii. Establish a 1:1 device/pupil ratio in all grade levels K-12.
 - iii. Educate students and parents about ethical digital citizenship.
 - iv. Create a Technology Committee with broad stakeholder representation including teachers and students to select products, resources, and to steer their application within the classroom. (Examples: "differentiated instruction", "reverse learning", "blended learning") Both the Technology Committee and Technology Department exist to serve the needs of students, faculty, the curriculum coordinator, and administration.
 - v. As eTextbooks continue to become available, incorporate them onto student devices to reduce textbook costs and backpack weight.
 - vi. Integrate into the language curriculum immersion training programs and applications that train fluency.

III.Improve student **Writing and Communication** skills

- a. Rationale: To succeed in the globalized era, our graduates must be able to effectively express themselves. Strongly preparing our students in these areas will enhance our profile in the local community, the colleges and universities to which we send our graduates, and among our alumni.
- b. Continue the work begun under the Curriculum Coordinator to **elevate writing and communications skills** across the Lower, Middle and Upper schools.
 - i. Implement 1:1 technology, which will allow the full impact of our new writing curriculum, writing best practices program, WWP (Writing Practice Program), and the WrAP writing assessment.
 - ii. Intensify writing across the curriculum.
 - iii. Continue and assess writing curriculum at all grade levels.
 - iv. Commit to professional development for our English department faculty and expand the role of English Chair to one of support, evaluation, and continuing development of all teachers within this department.
 - v. Review WrAP results annually against our baseline 2010 and 2011 results.
 - vi. Focus on developing verbal skills through speech, debate, verbal presentations, team learning in the classroom.

IV.Support our **Fine Arts Program**

- a. Rationale for an Arts program is the development of creative thinking, a skill needed to compete in the globalized economy. The school will become a more dynamic community as we continue to expand this focus on creative thinking and expression.
- b. Construct a Performing Arts Facility.
 - i. Provide adequate teaching, learning, performing space.
 - ii. Alleviate spatial constraints on other departments and functional spaces by consolidating Music, Band, Chorus, Theatre, and Forensics into one Building.
 - iii. Continue to engage every student in Art, Music, Chorus, Band, Theatre, or Forensics.

V. Prioritize **Collaboration**

- a. Rationale: To prepare our students for higher education, which is becoming more cross-curricular and collaborative in its ethos and infrastructure, and for their future working environments which will demand more co-action and cooperation, our school will purposefully hone collaboration as an underdeveloped 21st Century skill. A collaborative culture will create a greater sense of positivity and teamwork among faculty and happier, more broadly developed students.
- b. Without diminishing the importance of competition and individual accomplishment, establish more opportunities for students to work together both in and out of the classroom.
 - i. Implement 1:1 technology, which by its nature allows more interaction, sharing, and team problem solving.
 - ii. Continue Kagan Cooperative Learning and Project Based Learning teacher training initiated under our curriculum coordinator.
 - iii. Create inviting spaces and opportunities for students to share, interact, work in groups, and learn from one another.
 - iv. Empower students to play a more democratic, responsible and active role in their education.

VI. Focus on **Middle School** as a unique educational program.

- a. Rationale: To enrich the education of and meet the developmental needs of this age group, a determined approach is needed. A designated Middle School will benefit the other divisions with the school, and will become an attractive feature with which to grow our programs, enrollment and retention.
- b. Specific focus on the unique challenges and opportunities involved with this particular age group, and segregation are fundamental to a Middle School philosophy.
 - i. Dedicate to Middle School its own administrative head, counselor, faculty certified to teach this level, grade level deans, and scheduling.
 - ii. Consult with an expert in master planning for educational institutions to explore spatial configurations that can create a defined Middle School.

- iii. Furnish grades 5-8 with their own area, creating an internal sub-grouping of grades 5 and 6, and grades 7 and 8. This can be done by reconfiguration and retrofitting of existing structures or by new construction.

Funding

Committee members: Charles D. Buntin, Chair; Taylor Flowers, Reid Dove, Joseph Johnson, Karen McCarroll

I. Fundraising

- a. Rationale: To have funds readily available to address needs of Houston Academy, which will maintain our status as a 21st century school.
- b. Hire full-time Director of Development/Advancement who has proven capabilities in raising operating (and, ideally, capital) funds. Duties would include facilitating, maintaining and overseeing year around campaign with parents, grandparents, alumni and community.
- c. Design and implement a strong annual fund to supplement tuition funding in the operating budget.
- d. Communicate with and educate the parents of our students, seeking to acclimatize parents to the independent school environment of giving.
 - i. Communicate and explain the school's need for parents' support, particularly in the areas of student recruitment and both annual and capital funding.
 - ii. Educate "1st generation private school families" about "private school environment" and what tuition does and does not cover.
 - iii. Develop marketing information and concepts such as "Coffee with Headmaster" to educate new HA families about the importance and role of the Annual Fund and occasional capital funding drives.

II. Create a true "Culture of Giving" at Houston Academy

- a. Rationale: We want Houston Academy to be an institution our families are proud of by creating a desire to invest in the school's long term success.
- b. Assess our needs and create a "wish list" to motivate parents, past parents, alumni and friends to support our fine school through the

Annual Fund and other fundraising activities. Annually generate a “giving target list” to consistently improve facilities, grounds, technology, and programs.

c. The Board of Trustees will lead our community in all fundraising, setting an example for others with leadership-level gifts that kick-off both Annual Giving and periodic Capital Fundraising programs.

d. Launch Capital Funding Campaigns when needs require capital resources.

- i. Address the needs brought forward from the other planning committees.
- ii. Hire an outside consultant that specializes in facilities to assess space needs and offer solution options.

III. Broaden Alumni and Grandparent Relations

a. Rationale: Perpetuate a network of people whose lives were positively impacted by their experience at Houston Academy.

b. Expand alumni involvement to keep our graduates involved in the life of the school, and to expand alumni giving.

- i. Conduct an alumni survey to determine what will motivate them to support HA, and to attend school events. Plan, organize and implement receptions and reunions and other special events for alumni both at the school and throughout the state.
- ii. Maintain contact with young alumni while in college through email, “care packages, and college visits”.
- iii. Host an annual senior lunch to discuss the role alumni can play at the school. Explain why alumni financial support is crucial to the school.

b. Expand grandparent involvement. This will not only help brand the school as a “family school,” but can help increase annual giving.

- i. Add grandparents with executive experience and expertise to board and board committee nominees.
- ii. Invite grandparents as program speakers for all grade levels to "tell their stories."

- iii. Develop a yearlong calendar and program of inviting and involving grandparents in the life of the school.
- iv. Involve grandparents in a planned giving program for endowment: They are at the right life-cycle state, and they often have the resources to make a planned gift.

Human Resources

Committee Members: Scott Applefield, Chair; Linda Johnson, Julie Kinney, Karen Boothe, Elsa Hoffman

Goals:

- I. Insure that the employment environment for Houston Academy staff is fair, respectful, and promotes the optimum learning environment for the entire school community.

- II. **Recruit and retain the highest quality teaching and administrative professionals** to ensure that Houston Academy fulfills its Mission
 - a. Rationale: Houston Academy must commit and work hard to recruit and retain highly effective teachers, administrators, and staff.

 - b. Tactics to achieve this goal
 - i. Identify specific skill sets and personal qualities that are required for teachers, administrators, and staff
 - ii. Utilize marketing personnel to aid in new teacher recruitment and promote the benefits of teaching in an independent school
 - iii. Utilize professional placement agencies to recruit staff
 - iv. Recruit from outside the traditional “area” (Southeast U.S.)
 - v. Offer competitive salaries and benefits to attract and retain high performing staff
 - vi. Offer tuition remission of 50% as a recruitment tool and as an incentive for staff retention
 - vii. Foster a culture of innovation and engagement by soliciting ideas for improvement and including staff in course and curriculum planning.
 - viii. Recognize those employees that take on additional responsibilities and or perform at an exceptional level and reward their performance

III. **Evaluate** all employees annually

- a. Rationale: Meaningful and constant evaluation of employees is necessary to insure fairness and equity with all employees and to insure a proper match between individuals and the school's needs and expectations.
- b. Tactics to achieve this goal
 - i. Employ evaluation techniques based on the "21st Century School" directives
 - ii. Evaluations should be performed by all stakeholders to include, administrators, peers, parents, and students
 - iii. Evaluations and goal setting should be part of every annual review and play a central role in compensation and continued employment
 - iv. Evaluations should be reviewed with staff and used as guidelines for supervisory coaching and continuing education
 - v. Staff members should review their evaluation with their direct supervisors and should perform self evaluations

IV. **Prioritize Professional Development** to ensure that teachers, administrators and other staff members are prepared and have the knowledge to continually improve their job performance.

- a. Rationale: To ensure the success of Houston Academy and its students the staff must continually strive to hone and improve their skills thru professional development
- b. Tactics to achieve this goal
 - i. Applicable continuing education
 - ii. Financial assistance for advanced degrees or training
 - iii. Peer mentoring
 - iv. Encourage and pay for "field trips" to innovative and successful schools & companies where they can learn about new programs or techniques that can be implemented at Houston Academy.

V. **Update** Employee Handbook, job descriptions, and employment contracts

- a. Rationale: The current handbook is outdated, includes items that are unenforced and may or may not be necessary or important. There are no requirements for criminal background checks or drug testing. The proper use of electronic media is not addressed.
- b. Tactics to achieve this goal
 - i. Create a new handbook using best practices from top quality schools' current handbooks as templates while making sure that the requirements of employees are important, enforceable and in the best interest of the employees, students and parents.
 - ii. Have the handbook reviewed by qualified labor law attorneys
 - iii. Review handbook at least every 3 years for necessary changes and updates
 - iv. Ensure job descriptions are complete and accurate
 - v. Match employment contracts to accepted independent school standards and determine the proper time for their delivery to employees.

Marketing and Admissions

Committee members: Katherine Lee, Chair; Jimmy Addison, Rebecca McDonald, Marion Spivey, Autumn Steffens

Strategic Goals:

- I. Create a Houston Academy Marketing and Admissions team with the responsibility to plan and implement marketing initiatives at Houston Academy to improve the school's branding and ultimately serve the goal to meet enrollment objectives of this strategic plan.

- II. **Maximize Financial Stability** through optimal enrollment, tuition, and financial aid.
 - a. Rationale: Our overall budget is greatly impacted by the decline in enrollment. We need to determine optimum enrollment for our Preschool, Lower School, and Upper School and work to attain those numbers to financially achieve our strategic goals.
 - b. Hire full-time Director of Admissions/Marketing.
 - c. Increase the number and quality of applications submitted to Houston Academy and grow the matriculation yield of enrolling students.
 - i. Conduct "lost sale" telephone interviews with families who are accepted but go elsewhere.
 - ii. Offer tuition incentives—referral program, sibling discounts, etc.
 - iii. Target marketing toward outstanding community students that do not attend Houston Academy —“soft mail” them info about the school.
 - iv. Manage potential student database and target families to fill grades that are not full. Send mailings and email blasts on a regular basis.
 - d. Increase retention rates in Preschool and Lower School.
 - i. Conduct exit surveys, new parent surveys, new student surveys.
 - ii. Hold recruitment team meetings once a month to discuss and contact families that are considering leaving Houston Academy.

- II. **Encourage Families** to enroll in Lower School and remain at Houston Academy.

- a. Rationale: Our Preschool and Lower School enrollments are at an all-time low. We have to make efforts to stop this trend.
- b. Brand Houston Academy as the educational leader in the community
- c. Encourage community media outlets to spotlight Houston Academy as an educational leader.
 - i. Establish good relationships with the local media. Constantly feed articles of interest to the paper and the local news stations.
 - ii. Send press releases weekly to all papers within 30-mile radius (AL, FL, and GA) “tell our story.”
 - iii. Effectively and consistently market the personalities, education levels, etc. of teachers to separate Houston Academy from our competition.
- d. Target entry points in the community (chamber of commerce, CVB, local universities, local hospitals), and figure out how to have a presence there.
 - i. Cultivate relationships with and distribute promotional pieces to school “allies”: local realtors, physicians, relocation agencies, parents’ businesses.

III. **Communicate** the outcome of a Houston Academy education to the broader community.

- a. Rationale: Our community is not aware of the value and lifelong benefits of a Houston Academy education. HA needs to be regarded as the premier learning environment in our area to grow enrollment and increase retention rates.
- b. Complete Strategic Marketing Plan through LWT Consulting.
 - i. Create a blueprint for marketing HA that identifies target groups, each target group’s role in the success of the school, the target’s required belief and motivation, and what will make the entire process happen.
 - ii. Align these goals with Houston Academy’s overall strategy, marketing budget, and growth objectives to insure that all marketing efforts are supporting our strategic goals.
 - iii. Use Strategic Marketing Plan to determine yearly Marketing and Development/Advancement budgets.
- c. Create a universal branding message.
 - i. Develop a meaningful identity for Houston Academy.

- ii. New logo design, brand message, graphics standards guide and design of primary communications materials including letterhead, envelopes, business cards, social notes, and mailing labels.
- d. **Define our key distinctions and core values:** what additional educational value are we getting for our tuition (e.g. critical thinking, honor code, relationships, college placement)?
 - i. Update Admissions web page and Admissions packets.
 1. Videos
 2. Student Perspectives
 3. The Houston Academy Difference/20 Things to Know About Houston Academy
 4. Why Choose an Independent School?
 5. Link to NAIS brochure “The Lifelong Returns of an Independent Education”
- e. **Involve Parents and Faculty** as an active part of the marketing process.
 - i. Have the entire school community own the marketing goal.
 - ii. Arm faculty, parents, and US students with the proper info to sell the school: myths to dispel and points to brag about.
 - iii. Present "State of the School" addresses: headmaster and business manager go over the budget to emphasize what is working and what is needed.
 - iv. Hold "Coffee with the Headmaster" for mixed groups of parents for informal education and interaction. Use this to communicate the marketing message of the school

Houston Academy

A School with Learning Tools for the 21st Century

