

# The Northwest School

## Board Strategic Plan: 2013-2018

Amended June 1, 2015 and June 6, 2016

The task of setting strategic direction is a primary function of The Northwest School's Board of Trustees and senior management team. In 2007, Northwest went through an extensive, long-range planning process to produce a five-year plan within a forty-year context. Coincident with the school's reaccreditation by the Northwest Association of Independent Schools (NWAIS) this past year, the board has embarked on a strategic thinking and planning process to identify key areas of focus for the next five years. The intent behind this process was twofold: to identify and address current and longer-term opportunities and challenges; and to create a nimble framework to manage ongoing and emerging issues that have potential bearing on the school's mission, vision, and financial stability.

This plan is the culmination of much discussion, reflection, and collaboration, in various board, committee, and faculty meetings and retreats. The Board solicited input from parents, faculty, and students, and looked at current trends in education to inform our thinking and create a plan that is congruent with Northwest's culture and values. The resulting plan aims at concentrating our resources in four key areas: enhancing communication to our constituents; perpetuating faculty and program excellence; ensuring long-term financial sustainability; and enriching the physical campus. The plan comprises seven strategic "goals" and 24 corresponding "outcomes" that we aspire to achieve. We are currently taking action toward the advancement of some of these goals, while others are new initiatives to be undertaken.

Our board is committed to the oversight and maintenance of this plan, with our Head of School, Mike McGill, in charge of its practical implementation. Together, we will set priorities and timelines, create a supporting five-year financial plan, and monitor our progress. Implementation will involve the ongoing challenge of weighing competing priorities with finite resources; balancing needs that are immediate with those that confer future benefits to the school; and pursuing our mission within the reality of a shifting educational, social, and economic landscape. We aim to infuse the discipline of strategic *thinking* into the practical work of executing the plan. In turn, this will drive critical and generative discussions at the board level to ensure that our goals are relevant and worthy of continued pursuit.

We want to thank our volunteer Strategic Thinking and Planning Committee members: Lisa Anderson, Board Vice President; Alan Braun, Assistant Head of School; Cory Carlson, Board President; Jan Chiles, Assistant Head for Finance and Operations; George Edwards, Trustee and Committee Chair; Tom Lombardo, Treasurer and President Elect; Sue Maul, Faculty, Math; Adina Meyer, Faculty, Humanities; Mike McGill, Head of School; and Christine White, Trustee. In particular, we wish to thank committee chair George Edwards for his leadership and guidance of this entire process. We are also grateful to our consultant Terry Moore of Independent School Management for his facilitation at the outset of this process.

Finally, we wish to express our gratitude to the entire body of The Northwest School faculty, parents, and students for their contribution to the development of this plan. We look forward to continued engagement within our school community, as we venture forth on this new strategic path.

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## Strategic Plan 2013-2018

### **Advancement**

*Advancement encompasses admission, marketing, and fundraising. Through advancement, the school builds relationships with internal and external constituents, and markets the school.*

#### **STRATEGIC GOAL #1**

Refine the way we communicate the experience, meaning, and value of a Northwest School education.

##### Outcomes:

- comprehensive approach to communications that achieves congruity between marketing and experience
- succinct characterizations of our mission and professional excellence
- articulated benefits of our unique balance of arts and academics
- definition of “global perspective” in meaning and practice

#### **STRATEGIC GOAL #2**

Build philanthropic support to further the School’s mission.

##### Outcomes:

- successful completion of the Growing Our Campus capital campaign
- enhanced fundraising strategies and messages
- growth in contributions to our annual fund and financial aid endowment
- an active, engaged, and financially supportive alumni network

### **Program and Community**

*The Northwest School’s faculty, programs, and community are fundamental to our mission.*

#### **STRATEGIC GOAL #3**

Support and strengthen faculty excellence.

##### Outcomes:

- enhanced quality and consistency in academic faculty evaluation and development
- implementation of competitive faculty compensation
- investigation of pay structure models

#### **STRATEGIC GOAL #4**

Address key challenges of growth and change while maintaining the integrity and sustainability of our school culture.

##### Outcomes:

- determination of enrollment capacity consistent with educational philosophy and campus planning
- transition plans to address anticipated board and faculty turnover

- ongoing review and implementation of new technologies
- greater congruity between our environmental commitment and our programs and practices

### **STRATEGIC GOAL #5**

Articulate the Board's definition of diversity, equity, and inclusion, and engage the school's leadership in a conversation about key priorities to ensure that we honor our historic commitment to these values.

#### Outcomes:

- adoption of a Board Diversity, Equity, and Inclusion Plan to assure culturally responsive Board and School leadership
- a heterogeneous Board, promoting creativity, innovation, and diversity of perspectives, helping the school meet its mission
- effective modeling of our values of diversity, equity, and inclusion for the larger community
- measuring and monitoring the school's diversity, equity, and inclusion goals and values in order to increase awareness and assure accountability

### **STRATEGIC GOAL #6**

Ensure we offer a model international program that provides value to the educational experience of both domestic and international students.

#### Outcomes:

- an international student population diversified across language, geography, and culture
- enhanced opportunities for cross-cultural connections among domestic and international students and families
- enriched partner relationships with organizations, both domestic and abroad

## **Financial Planning**

*Comprehensive financial planning is critical to long-term sustainability. Our strategic initiatives will always be supported by a strategic financial plan.*

### **STRATEGIC GOAL #7**

Further refine a revenue-expense structure that responsibly supports school growth and student diversity.

#### Outcomes:

- comparison of tuition strategy models (i.e., all-in tuition vs. tuition + fees); effective communication of the decision to relevant constituents
- adherence to hard income coverage policy at 100%
- increased cash reserves to support property acquisition
- growth of financial aid endowment to provide for an increase in funded awards

## **Campus Plan**

*Our campus is crucial to the programs we offer. The Board is committed to quality, sustainable facilities to support those programs.*

### **STRATEGIC GOAL #8**

Provide a physical campus that advances the School's mission, programs, and long-term vision.

#### Outcomes:

- new master facilities plan which reflects overall enrollment and program goals
- strategic purchase of nearby properties consistent with the Board's contiguous campus plan