

# Waring School Three-Five Year Strategic Plan

July 14, 2015

## *The Waring School Mission*

“To create and sustain a community of lifelong learners who are working together for the individual and common good.”

## Foreword

Waring's ethos that learning should be challenging and transformative remains vibrant and relevant. Its secure future, however, depends on adapting to the demands of the world around it. Waring is now in its fifth decade. During this period independent school education has gone through many changes. Ideas for improving teaching and learning have followed each other in rapid succession, for example: collaborative groupings, differentiated instruction and curriculum mapping. The advent of the internet and social media has profoundly altered the pathways of teaching and learning.

Waring has kept abreast of some of these trends and technologies and made thoughtful decisions on how to implement them within its traditions. Given its priority on the student-teacher relationship, the school's care vis-à-vis these innovations has generally been seen as a strength.

The economics that support independent schools has also evolved. Stagnation of middle-class incomes and widening inequality have put strains on the financial models that served well in the past. The nation's and the region's demographics are shifting. And the demands to provide more comprehensive services beyond the classroom continue to increase.

Through all these changes, Waring continues to graduate inspiring and inspired students. It is hoped that this Strategic Plan will guide current and future participants in the community to ensure that security and guarantee that the Waring School experience can inspire future generations.

## **Introduction: The Waring School Model**

Waring School is a close-knit community of teachers and students, committed to high intellectual rigor and strong academic preparation, with unique aspects that set it apart from other schools.

Waring's special features are a legacy of the founders, Philip and Josée Waring, who believed that school should feel like an extended family and inculcate learning habits for life. They believed in nourishing a love of learning unfettered by such artificial strictures as grades, and enriched by a multitude of experiences outside the traditional classroom.

The Waring School learning environment is strengthened by close relationships with faculty, a size where no one can slip through the cracks, and a strong sense of community built upon the following key experiences shared by all students:

### **Waring School Key Experiences**

- A culture of engagement, ownership and risk-taking in our students and faculty
- A culture that values the analytical mind and the expressive voice
- Multi-age classes and advisement (“Tutorial”) groups
- Assessment by narrative evaluations in place of letter grades
- Student travel and exchange programs across the US and abroad
- Formative leadership options such as teaching assistantships
- Endterms and trips that take students out of the classroom and into the world
- Required performing arts, visual arts and athletics programs
- French language and cultural immersion
- An opening Camping Trip that establishes the foundation for a strong school year
- Frequent all-school meetings with presentations and discussion among all grades

## **The Waring School of the Future**

The Waring School Model continues to have a profound influence on the lives of the young people who are fortunate to experience it. Surveys of parents, alumni, and faculty confirm that the preservation of the School's culture and values is of the highest priority and that the Model's key experiences play an essential role in fulfilling the School's mission.

Many of the trends in secondary education today, such as shared learning across disciplines and age groups, giving equal value to the arts and experiential learning, and providing connections to students in other cultures, have long been in Waring's bones. Moreover, enthusiasm for learning in the classroom carries through the entire Waring experience.

The Waring School of the future will expand on these forward-looking traditions by adding the following important characteristics to its already successful model:

### **Aspirations for the Waring Model**

Waring will have a reputation of being strong in all areas, with new programmatic initiatives across disciplines.

Waring will be gender balanced, with offerings that compete successfully to attract students of both sexes.

Waring will have a diverse student body and faculty. Financial aid will be available for worthy students from more diverse communities.

Waring will be a place where students and teachers of any ethnicity, race, religion, sexual orientation and socioeconomic class will feel supported.

Waring will be financially sustainable, with an endowment sufficient to support the richness of its program and the quality of its faculty.

Waring will have an attractive campus that preserves its original character. The campus will include facilities that support strong athletics, science and arts programs, and provide efficient and comfortable professional space for faculty and staff.

Waring will have a reputation extending beyond the immediate region as a leader in progressive, student-centered teaching and learning. The "Waring School Model" will be emulated by educators within and beyond its geographic area.

## **Challenges for the Future**

The educational landscape continues to evolve rapidly. The next decade will present opportunities and challenges for Waring similar to those confronting many independent schools today. Waring must meet these challenges while continuing to build on its wonderful traditions and culture.

### *Facilities to Support the Mission*

Waring's campus has several buildings with character and many beautiful landscape features. However, there are aspects of the program that continue to be constrained by the condition of some facilities and inadequate space.

### *Endowment Growth*

Waring is fortunate to have an endowment equal to \$40K principal per student. The richness of its program and the financial imperatives of the current independent school climate, however, require more funds to ensure Waring's future.

### *Enrollment and Marketing*

Waring is located in a competitive marketplace, with many good choices for families considering an independent school. To sustain an enrollment that can support its excellent program to the fullest, the value of a Waring education must be known to a wider audience.

### *Faculty Support*

Waring is driven in many ways by its faculty. Waring's outstanding faculty are the touchstone of the school and among the hardest-working teachers anywhere. The Waring Model stands or falls on their commitment to its values. Strong support for competitive compensation and professional development is a must.

### *Affordability and Access*

The cost of a Waring education has risen, albeit less dramatically than in some schools. More families at higher income levels are requesting financial aid in order to afford Waring, yet the school's budget allocation for aid is already above norms.

### *Best Practices for Waring in Governance and Leadership*

It is important that Waring's Board Chair and Head of School lead a dialogue among the faculty, staff and board to discuss best practices suitable for Waring in governance and leadership.

## **Plan Design: Strategic Themes**

The Strategic Plan identifies three themes that together are intended to meet the challenges of the next decade—a roadmap for managing Waring’s growth and development.

- I. Institutional Vitality and Sustainability**
- II. Teaching Excellence and Mission-Directed Learning**
- III. Diversity**

The themes of this plan form a framework within which the School can make thoughtful and careful progress to further strengthen its dynamic teaching and learning environment.

## **Strategic Theme I**

### **Institutional Vitality and Sustainability**

Ten years ago NAIS coined the phrase “The New Normal” for the pressures that every independent school must face. Simply put, schools cannot afford to be complacent about issues that affect enrollment and budgeting.

Waring must create a more sustainable financial model while preserving its commitment to strong relationships within the community. Excellent facilities, financial stability and healthy enrollment are key components of such a model.

#### **Goals:**

- 1) Develop and Implement a New Campus Master Plan**
- 2) Conduct a Comprehensive Campaign for Campus Improvement and Endowment to Fund Programs and Faculty Support**
- 3) Enlarge the Applicant Pool**
- 4) Strengthen Alumni Relations**
- 5) Strengthen Communication Around Responsibilities of the Board of Trustees, Head of School, Faculty and Administration**

## *Institutional Vitality and Sustainability (cont.)*

### **Goal 1: Develop and Implement a New Campus Master Plan**

#### *Rationale*

Waring has a naturally beautiful campus with excellent open space, a variety of landscape features and some buildings that have great character and history. As the school evolves, however, so must the campus, and the most pressing needs include the following:

- All-school meeting space. The Polygon is much loved for its shape and coziness but was not originally designed as a meeting space for the entire student body.
- Theater/auditorium. The current Theater is too small and lacks essential areas for production work. Large community events such as concerts and Convocation must take place outdoors or in the gym.
- Gymnasium and athletic support spaces. It is difficult to accommodate the athletic program in the current facility, and the locker rooms need upgrading.
- Head of School residence. This has been a priority for the last three years, as having a house on campus for the Head supports the culture of the school.
- Additional classroom space, improved office areas and entrances. The School entrance is cramped, as are upstairs faculty offices. The nurse's office is below grade and flood-prone.

There must be an overall logic to any renovation or expansion that will guide the long-term renewal and development of the campus.

#### *Initiatives:*

1. Engage an architectural/planning firm to develop a comprehensive, phased, 10-year Campus Master Plan, in order to establish an overall vision for the future of the campus and provide a framework for future development decisions.
2. Implement the Plan with continuing input from the school community.



*Institutional Vitality and Sustainability (cont.)*

**Goal 2: Conduct a Comprehensive Campaign to Fund Campus Improvement and Increase Endowment**

*Rationale*

Students, parents, and graduates regularly describe Waring as “transformational.” Waring philanthropy, accordingly, should reflect the enormous benefit and value that the school provides.

Waring has been increasingly successful in its annual giving efforts over the years. With the help of an expert fund-raising consultant, the Advancement Office has been re-organized and its fund-raising efforts are being upgraded on all fronts.

However, Waring is still 90% tuition dependent for its revenue, leaving little plasticity for new programmatic ideas or unforeseen circumstances. Non-tuition revenue in the form of endowment interest/capital is being used to help fund current programs.

Waring must stay vibrant and competitive with other schools. A new capital campaign to update facilities and build endowment is therefore critical.

*Initiatives:*

1. Continue to follow the recommendations of outside Development counsel, including a fund-raising feasibility study.
2. Plan and initiate a comprehensive campaign once priorities are set and goals established.

*Institutional Vitality and Sustainability (cont.)*

**Goal 3: Enlarge the Applicant Pool**

*Rationale*

The growing perception today is that independent schools have become too expensive, especially below the Ninth Grade. This, combined with more options for strong public schools, charter schools, and parochial schools, has affected the independent school market profoundly.

Although our high school tuition is competitive, middle school tuition is not. Waring's stretched resources for financial assistance therefore place it at a disadvantage in competition for the most qualified students, especially in the lower three grades.

Waring can no longer be "the best kept secret on the North Shore." Its value proposition must be clear and palpable. The recommendations outlined in the recently completed Marketing Task Force Study must be given a high priority.

*Initiatives:*

1. Implement Marketing Task Force plan recommendations as soon as possible. These include internal and external marketing, outreach to new geographical areas, increasing transportation options for students, analysis of financial aid policies and distribution, and campus visibility and presentation.
2. Analyze admissions trends in inquiries, applications, new enrollment, and attrition.
3. Set and adhere to the portion of the budget dedicated to financial aid. Direct financial aid resources to attract a more diverse student body.
4. Enhance and strengthen summer programs to increase revenue and to recruit new students.

## *Institutional Vitality and Sustainability (cont.)*

### **Goal 4: Strengthen Alumni Relations**

#### *Rationale*

Although a young school with 550 alumni, Waring's influence today is impressively widespread. Waring graduates have done extraordinary things, and many of them attribute their accomplishments to the foundation and habits of mind that they acquired at Waring.

Recent surveys confirm that most alumni are grateful for their Waring education and want to feel more connected to the school. The school in turn should provide ways to support and celebrate them. Ultimately, as the alumni body matures, there will also be further opportunities for advancement and fundraising. This support is crucial for the viability of any independent school.

Waring is proud of its graduates. The school must continue to reach out and re-engage them to foster good will and strengthen the loyalty of the larger community.

#### *Initiatives:*

1. Enhance alumni outreach in the Advancement Office.
2. Create an alumni organization with representatives, regular communication, and events.

*Institutional Vitality and Sustainability (cont.)*

**Goal 5: Strengthen Communication Around the Responsibilities of the Board of Trustees, Head of School, Faculty, and Administration**

*Rationale*

Each Waring constituency exhibits genuine dedication and commitment to the mission of the school. It is through good governance practice and mutual understanding that each constituent's role and responsibility is defined and alignment of common purpose is achieved.

In addition to clear roles and responsibilities other critical elements are required: consistent communication, transparency of action and purpose, accountability, and an environment of trust. The 2014 NEAS&C accreditation team's recommendations re-affirmed the need for attention to these areas.

*Initiatives:*

1. Examine and clarify the roles and responsibilities of the Board, Head, Faculty, and Administration, in particular as they relate to a governance model that suits Waring's ethos while conforming to NAIS standards.
2. The Board of Trustees should create appropriate opportunities to engage constituents in ways that inform and support its work on behalf of the school such as through faculty membership on committees and through open discussions on common readings about leadership and teaching.

## **Strategic Theme II**

### **Teaching Excellence and Mission-Directed Learning**

Waring School has an extraordinary faculty. Our teachers are dedicated and committed to the mission and to the students. Teaching at Waring is more than a job—it is, for many, an actualizing way of life. Faculty seek to model the same growth and authenticity that the school imparts to its students.

Waring therefore needs to remain true to the mission that has attracted and nourished excellent teachers. It must be competitive in compensation, with support for faculty professional development and evaluation.

#### **Goals:**

- 1) Enhance Faculty Compensation to Attract and Retain Excellent Teachers**
- 2) Strengthen Professional Development and Evaluation**
- 3) Design a Mission-driven Schedule**

*Teaching Excellence and Mission-directed Learning, cont.*

**Goal 1: Enhance Faculty Compensation to Attract and Retain Excellent Teachers**

*Rationale*

Although faculty often cite the non-tangible benefits of teaching at Waring as the most important reason for their working here, it is critical to remain competitive in the independent school market in order to attract and retain the best faculty.

*Initiatives:*

1. Form a work group comprised of faculty, administration and trustees to examine the pay, benefits, and other roles and responsibilities with the goal of making Waring an attractive place to work. Tuition remission and sabbaticals will be a part of this discussion.
2. Examine class size and overall staffing efficiencies at the school, while preserving the cultural imperative of maintaining faculty support for every student. Move closer to the NAIS standard student/teacher ratio.

*Teaching excellence and mission-directed learning (cont.)*

**Goal 2: Strengthen Professional Development and Evaluation**

*Rationale*

Rapid change is a given in the 21<sup>st</sup> Century. Technology, social media, opportunities for on-line learning, virtual experiences, and the overall pace of the student experience have created a landscape very different from that of only a few years ago. The faculty, staff, and administration at Waring need to stay abreast of current thinking in these new areas as well as the more traditional ones.

Faculty evaluation is also essential for maintaining teaching excellence. In a school like Waring that feels like a large family, effective evaluation requires openness and a common understanding of its value for professional growth.

*Initiatives:*

1. Assign a fixed portion of the budget to faculty professional development.
2. Continue to refine the faculty evaluation process and link it to professional development as appropriate.

## *Teaching excellence and mission-directed learning (cont.)*

### **Goal 3: Design a Mission-Driven Schedule**

#### *Rationale*

Fundamental to Waring's mission is high intellectual discourse, with a consequently demanding academic and co-curricular schedule. The challenges that arise from this situation can have deleterious effects on students and faculty, and hence on the relationships so essential to the school's mission.

Interdisciplinary learning is also a key aspect of the Waring experience. The STEAM areas (Science, Technology, Engineering, Mathematics and Art), which are seen as important in pre-college curricula, increasingly depend on crossover learning. Creative scheduling may allow collaboration among students in these areas and off-campus coordination with other organizations.

Given the competing needs for time from all areas of the program, the faculty and administration need to review the course schedule, the student workload across departments, and flow of the academic day for students and teachers.

#### *Initiative:*

1. A faculty committee will consider the current schedule and seek improvements.
2. Review department curricula and the summer program with an eye towards developing STEAM program initiatives.



## **Strategic Theme III**

### **Diversity**

Waring is justly proud of its commitment to fostering support for many learning styles within a common academic, global and experiential program. The program has also branched out beyond its Western civilization focus in some areas. Nevertheless, multiculturalism still needs attention, as do issues of identity, religion and ethnicity, which have not been a priority for the School thus far.

The case for diversifying the student body is compelling. A rich mix of students from a wide variety of backgrounds makes for a more dynamic school experience. As the world shrinks and our population diversifies, Waring must prepare its graduates to work and play with citizens of a global community.

Diversity also has the potential to raise the bar for learning. Research shows that when students interact with peers different from themselves, they exert more intellectual effort and brain activity is intensified. Diversity is therefore essential to promoting the high academic expectations central to Waring's mission.

Finally, diversity is now linked to outreach and sustainability. Demographic trends suggest the marketplace for independent schools will be very different in the coming decades. Schools who are able to attract a broader spectrum of students and families will find this marketplace more hospitable.

Waring must focus on these aspects of diversity clearly and directly. There should be an honest and realistic assessment of the school's history as well as a broad effort to educate the community. Furthermore, NEAS&C noted the absence of an explicit reference to diversity in our mission and values statements.

#### **Goals:**

- 1) Prioritize Diversity in Admissions and Staffing**
- 2) Develop Program Opportunities to Promote Community-wide Multicultural Awareness**

*Diversity (cont.)*

**Goal 1: Prioritize Diversity in Admissions and Staffing**

*Rationale*

Successful efforts to improve diversity begin in the adult community – teachers, staff, administration, and board. These efforts will increase the possibilities of recruiting a broader range of students.

In admissions, there needs to be greater outreach beyond our traditional neighborhoods into more diverse communities. Financial aid should be targeted and more transportation options provided. Actions should be taken to forge connections between the school and community organizations that promote the welfare of diverse populations. The Waring Works summer program has already seen some success with similar efforts.

*Initiatives:*

1. Create a school diversity policy and establish a Board committee on diversity.
2. Prioritize diversity in hiring.
3. Examine ways to allocate financial aid resources to support diverse candidates.
4. Establish outreach to and offer transportation from more diverse communities.
5. Actively recruit for diversity at the board level.
6. Continue summer program diversity outreach and support.

*Diversity (cont.)*

**Goal 2: Develop Program Opportunities to Promote Community-wide Multicultural Awareness**

*Rationale*

The Waring program reflects its most deeply held values. To simply state that we believe in those values, however, is not sufficient: the program must live them. If diversity is to be one of those values, then its program must be examined through that lens.

Efforts should be made to broaden the scope of the program without compromising its many successful aspects. High school Humanities and Writing courses, arts events, travel and Endterm projects all offer opportunities for further multicultural learning experiences. Conversations around identity issues as race, ethnicity, gender, culture, socioeconomics, and LGBTQ need to be fostered in and out of the classroom.

*Initiatives:*

1. Bring in a diversity consultant to advise faculty and staff.
2. Study options to enhance the current program through the lens of diversity.

## Afterword

In the 2013-2014 academic year, the Waring Board of Trustees approved the commissioning of a Strategic Long Range Plan. The school's previous plan had been done in 2002.

Since the school was in the midst of preparing its self-study report as a requirement for continuing accreditation by the New England Association of Schools and Colleges, the Board decided to create the Strategic Plan following the completion of the report and the analysis and recommendations of the visiting accreditation committee in fall of 2014.

The preparation of this document was directed by consultant Clay Stites and the Strategic Planning Committee, whose membership included the Chair of the Board, trustees, administrators, faculty and the Head of School. The process has involved all constituencies of the school.

The Planning Committee based its work on surveys, faculty meetings with trustees and the consultant, interviews and student focus groups. It presented the document to the Board of Trustees in April, 2015.

The process was carried over with some new input and revision in June, 2015, following changes in Board and school leadership. The updates were overseen by Dick Prouty, the new Board Chair, and Tim Bakland, Waring's new Head of School.

### *Original Strategic Planning Committee*

Clay Stites, consultant  
Stephen Hinrichs, Chair of Board of Trustees  
Christine Sherratt, Vice Chair of Board of Trustees  
Melville Brown, Head of School  
Joel Monell, trustee  
Robine Vaneck, Math and Science faculty, Dean  
Francis Schaeffer, Dean of Faculty  
Tim Bakland, Chair of Performing Arts Dept.  
Dorothy Wang, Assistant Head of School, Director of Admissions

### *June, 2015 revisions oversight*

Dick Prouty, Chair of Board of Trustees  
Joanne Avallon, Vice Chair of Board of Trustees  
Tim Bakland, incoming Head of School

### *Waring School Guiding Assumptions/Core Beliefs*

- Learning is an essential and defining human activity that involves the whole person throughout life
- A learning environment should stimulate this powerful, inherently human desire to learn and to grow. We believe that most learning in a lifetime takes place outside of school and that one of the purposes of school is to prepare an individual to learn on his or her own.
- A supportive and stimulating learning culture affirms intellectual tolerance and social unity.
- Emphasis on community validates shared experiences outside of the classroom such as all-school meeting, mixed-aged tutorials, camping trip, and the common language of French
- Teaching and learning go hand-in-hand and that most learning takes place within the context of relationships, including but not limited to faculty to students, students to students, faculty to faculty.
- The ability to author growth in others is the essence of leadership.
- Learning entails the responsibility to develop and exercise one's personal "voice" by being public about what one is thinking and feeling. We seek to affirm the unique voice—spoken, written, and artistic—of each member of the Waring community.
- Learning compels us to use our knowledge responsibly in the service of multiple communities, both locally and globally.
- The liberal arts are those branches of knowledge that contribute to the liberation of the mind and imagination through risk-taking and the knowledge of our world and ourselves.