



Manlius Pebble Hill School

Strategic Plan 2009 - 2014

Revised January 2010

Manlius Pebble Hill School

Roadmap to 2014

All organizations risk stagnation unless, in their pursuit of excellence, they periodically pause to reassess the direction in which they are moving and focus anew on their vision for the future. In its continual drive for excellence in independent education, Manlius Pebble Hill regularly engages in that visioning process, which entails both the periodic affirmation of the School's mission and the development of a Strategic Plan to chart the School's course for the years ahead.

After a yearlong re-examination of the School's mission statement by trustees, faculty, staff, and select groups of students and alumni, an updated mission statement was embraced and approved by the Board of Trustees in November of 2008. Soon after, on January 17, 2009, the School held a strategic planning retreat to answer the questions, "*Where do we want MPH to be in the year 2014?*" and "*How do we get there?*"

Focus groups comprised of trustees, administrators, faculty members, and alumni addressed those questions in the specific context of eight key areas of school activity: development, plant, community, faculty, alumni, finances, education, and marketing. The five-year Strategic Plan that emerged from the retreat is, in essence, a roadmap for achieving our mission-driven goals. It is intended as a flexible document to guide decision-making through the year 2014. The following pages constitute a living document, one which can be expected to undergo revision as changing conditions dictate and to further evolve as the School prioritizes and implements the plan.

Strategic Plan 2009 – 2014

Development

Goal: Increase donation income and participation from all School constituencies in all major donation categories, including the annual giving campaign, the capital campaign, planned giving, and special events.

Key Strategies:

- Identify and cultivate all major constituencies, with a member of the Development Committee responsible for reaching out to and connecting with each of the following:

Trustees, both current and former	Room Parents
1869 and Circle of Excellence Level Donors	Alumni
Parents of current and former students	Faculty and Staff
Representatives of the Parents' Association	Friends
Corporate Partners	Grandparents

- Ensure that the Development Committee includes diverse representation from each of the major constituencies identified above, and all other School constituencies, while providing for:

Geographic diversity representing all major areas from which the School draws students; and
A spread among the grades from Upper School to Middle and Lower School.

- Ensure a steady program of education concerning the need for private donations to support the mission of the School.
- Identify and cultivate future Development Committee leaders to ensure succession planning and fresh ideas for fundraising and to provide for regular rotation among Development Committee leadership to ensure that no constituency feels excluded from the development effort.
- Coordinate with other Board and School committees to maximize cultivation opportunities, to reduce donor fatigue by making sure that not every contact with a donor or potential donor is a request for a gift, and to ensure that the development message is not diluted.
- Develop metrics to identify trends quickly so that the committee can respond as appropriate in a timely manner.
- Continually monitor events with respect to budgeted and actual revenues and expenses to improve margins and net income.
- Ensure that each committee member seeks to contact all of the past and potential donors within his or her respective constituency to allow them the opportunity to contribute to the vitality and long-term stability of the School

Plant

Goal: Ensure effective utilization, maintenance, and repair of facilities, as well as effective planning for master site plan projects.

Key Strategies:

- Consider all projects in terms of the following framework:
 1. educational mission
 2. technology
 3. cost
 4. revenue opportunities
 5. safety
 6. environmental impact
- Plant needs are typically addressed from the standpoint of immediate maintenance need or current need for space. Move to a more forward-thinking approach, with greater input from faculty and students and in consideration of around-the-clock, year-round utilization of the physical plant.
- Create formal mechanisms to increase communication between the Plant Committee and its constituents (students, faculty, staff, parents, other users of our facilities) via face-to-face interactions and online communications.
- Restructure Plant Committee agendas to focus on higher level renovation and Master Site Plan projects, rather than repair issues; add annual review of the Master Site Plan to the responsibilities of the Plant Committee.
- Investigate opportunities for receiving donations of funding and/or materials toward specific plant projects, large and small.
- Complete next phase of Master Site Plan construction, the new library/media center.

Community

Goal: Continually engage all members of the School's internal community and solidify Manlius Pebble Hill's perception in the community-at-large as a valuable resource in Central New York.

Key Strategies:

- Enlist the goodwill and cooperation of the internal community through increased communication and dialogue, personal connections, and opportunities for all to share their individual strengths.
- Clearly define the quality-of-life needs of all members of the MPH community (students, families, faculty and staff, friends, alumni, and parents of alumni) and identify who at MPH is responsible for making sure those needs are met.
- Promote further parental involvement at the School through new "connecting events" and through exploring the feasibility of creating a dedicated space for the Parents' Association.
- Demonstrate our sensitivity to single-parent families, families with two working parents, and families with children in need of special services, by letting them know of our support services, our flexibility in scheduling meetings, and our desire to find ways for them to be involved in their children's school.
- Continue to improve the Central New York community's view of MPH by undertaking events that increase our perception as a good neighbor and that, like our free community seminars, establish the School as a resource and networking facilitator and that leverage our long-standing commitment to excellence.

Faculty

Goal: Attract and retain highly talented faculty, provide the resources to enable their continued professional development, and establish MPH as the school of choice for dynamic, creative teachers.

Key Strategies:

- Encourage collaboration among teachers, not only from the standpoint of student curriculum, but in terms of learning from each other to evolve their practices.
- Enhance the roles of department chairs and utilize faculty members as master teachers.
- Continue to provide professional development opportunities for faculty, staff, and administrators.
- Insist that faculty members increase their knowledge and use of technology.
- Institute a consistent teacher evaluation process that is based on trust and that entails peer, student, and administrator evaluation.
- Utilize the findings of the alumni longitudinal study in reviewing curriculum and teaching practices.
- Achieve consensus agreement on the need for a learning environment that values the faculty role in content specialization, complimented by service learning.
- Provide additional support to teachers with learning differenced students.

Alumni

Goal: Increase the number and size of alumni contributions to MPH and increase alumni involvement in the life of the School.

Key Strategies:

- Target our multiple groups of alumni differently in communication, cultivation, and solicitation.
- Shift the general focus on alumni to the emerging alumni base of younger MPH graduates, employing use of Facebook, blogs, and other networking technology; affinity groups; themed alumni notes; faculty connections, etc.
- Engage current students and faculty with alumni; educate current students about the School's history.
- Conduct a brief alumni survey targeted to each of the three schools to gauge the propensity of alumni to give to charity in general and to MPH in particular, as well as to determine the types of activities and alumni events that would attract them.
- Have alumni reach out to other alumni via targeted, interest-based e-mails.
- Re-examine the role of the Alumni Board.
- Increase the ease of giving online and enable alumni to make gifts toward specific items (MUN plane ticket, gardens, etc.)
- Determine who it is who is most appropriate to solicit alumni gifts – development staff, other alumni, members of the Alumni Board, etc.

Finances

Goal: Reduce Manlius Pebble Hill’s level of tuition dependency; augment current financial reporting to the Board of Trustees to assure the Board’s full understanding of the School’s fiscal realities.

Key Strategies:

- Re-evaluate financial reporting to the Board, including reports pertaining to the budget, five-year fiscal plan, post-capital project review, financial aid, income statement, balance sheet, capital campaign, and “dashboard” key indicators. Conduct Board education regarding the work of the Finance Committee and the fiscal controls the School has in place.
- Seek other revenue sources to reduce the School’s dependency on tuition – e.g., endowment growth, annual giving, events, community programming, and other income sources.
- Grow the endowment. It is recommended that an independent school have an endowment three times its operating budget. For MPH, that would mean an endowment of \$27 million. We currently have \$2.2 million in our endowment.
- Develop a formal policy regarding undesignated bequests and planned gifts to the School.
- Re-examine the School’s debt, evaluating alternative debt structures and the timing of debt on new buildings.

Education

Goal: While maintaining the School’s strong commitment to core competencies, seek to further strengthen the curricular program through character education, service learning, and experiential and project-based education.

Key Strategies:

- Foster character development by encouraging student investment in the community and service to others.
- Embrace the challenge of allowing students a greater voice and increased ownership of MPH.
- Acknowledging that competence in basic academic skills informs learning by doing, and vice-versa, share “best practices” about balancing the two aspects of student education.
- Utilize affinity groups and the results of the “Assessment of Inclusivity and Multiculturalism” to build on the strength of diversity.
- Explore the International Baccalaureate program, to align with the School’s commitment to globalism.
- Given the successful introduction of Mandarin Chinese to the World Language curriculum, explore the possible addition of Russian and Arabic, as well.

Marketing

Goal: Market effectively both to retain current students and to attract new students from the external community so that full enrollment is attained.

Key Strategies:

- In marketing to current families, focus on the value of independent education, what MPH does that makes it different from other schools.
- Commit the financial resources and manpower necessary to utilize the School's website to greater advantage. Improved web design and capabilities will allow us to tell our story, to streamline digital content (view book, applications, reenrollment and other forms, curricular mapping), to tailor content to multiple users (students, parents, prospective parents), and to customize marketing to individual groups of people.
- Shape our image by demonstrating how we act to fulfill our mission (through sustainability efforts, diversity, flexibility, tolerance, etc.).
- Market community programs as meeting the MPH standard of excellence; expand offerings that set us apart from other schools.
- Investigate the validity of adding a three-year-old program at MPH and institute if appropriate.

Strategic Planning Committee

The following individuals participated in the Strategic Planning Retreat, which culminated in the Manlius Pebble Hill School Strategic Plan 2009 – 2014.

Baxter F. Ball, *head of school*
George S. Urist, *president, Board of Trustees*

Lynne Allard, *director of admission*
Trent Amond, *parent*
Maureen Anderson, *director of alumni relations*
Charlie Beach, *former trustee*
Fred Benedict, *alumnus, school archivist*
Martha Cameron, *director of community programs*
Will Cardamone, *dean of students*
Pete Carmen, *trustee*
Gary Carpenter, *trustee*
Jayne Charlamb, *trustee*
Nancy Dock, *trustee*
Jim Eagen, *head of Middle School*
Tracy Frank, *chief financial officer*
Bill Futera, *trustee*
Debbie Freund, *trustee*
Nancy Gallery, *advancement associate*
Susan Gullo, *director of communications*
Jan Hampton, *secretary, Board of Trustees*
Chris Hempel, *head of Upper School*
Kristin Hempel, *director of community outreach*
Jenny Hicks, *treasurer*
Dan Jonas, *trustee*
Mady Kudisch, *trustee, president, Parents' Association*
Peter Manolakos, *president emeritus, Board of Trustees*
Melissa Montgomery, *trustee*
Tina Morgan, *director of development*
Liza Morrison, *director of information services*
Jennifer Neuner, *director of special events*
Marna Redding, *alumna*
Jennifer Reece-Barnes, *vice president, Parents' Association*
Paul Sack, *vice president, Board of Trustees*
Gary Slutzky, *trustee*
Matt Spear, *Middle School dean of students and faculty member*
Jamie Sutphen, *trustee*
Peter Terry, *faculty member*
Lydia Turnipseed, *trustee*
Hilary Yeager, *alumna*
Jon Verbeck, *trustee*
Josh Wells, *vice president, Board of Trustees*