



# Trinity Classical Academy

## Strategic Plan 2015-2020 Trinity Classical Academy

### **STATUS UPDATES ON TIMELINES AS OF AUGUST 2017** (indicated in **BOLD** font)

#### **Introduction to the Planning Process and Summary of Community Values**

Trinity Classical Academy of Santa Clarita, California is an independent, co-educational, day school serving more than 500 students in grades TK-12. Founded in 2001 with 28 students enrolled, the school has experienced nearly continuous growth, year over year, establishing itself as one of the fastest growing and largest classical Christian schools in the country.

Trinity's mission is to offer a challenging education grounded in the Christian faith and the classical tradition to produce young men and women of virtue, wisdom, purpose, and courage. One need only to spend a few minutes in the company of Trinity faculty and parents to realize that this mission—especially the complements virtue, wisdom, purpose, and courage—permeates both the mentality and the experience of the Trinity community.

In the course of three full days of interaction with students, parents, staff, and others—more than 400 participants all together—Trinity's unique characteristics, both advantageous and otherwise, were on full display.

First, and most obviously, is the effect of the founding vision and leadership of Liz and Wally Caddow. Though many of the parents and staff that make up the Trinity community today were not present at the founding and may have little knowledge of the sacrificial determination that the Caddows invested in the early years, their contributions are gratefully and vocally acknowledged. That they have been able to make adjustments in their roles as the school has grown, transitioning successfully from stage to stage, is a tribute to their commitment to both the integrity of Trinity's mission and to personal and professional growth along the way.

A second characteristic is the fierce loyalty that the board and staff assign to the Caddows and Trinity. The administrative team, especially, have been working together, in various roles and combinations, for much of the school's existence. Despite seasons of weariness and uncertainty, they remain a tight-knit group, creatively solving problems and working toward constant improvement together. Sitting in meetings or at lunch with the executive staff, one senses the depth of their commitment to and care for one another. These relationships seem to translate into a similar loyalty and care toward students and families, strengthening the community.



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A third unique characteristic has to do with the market within which Trinity was founded and has thrived. Unlike other parts of the Los Angeles area, there has not historically been a strong natural demand for private schooling in the Santa Clarita Valley. One could look at this in two ways: 1) that with little competition, Trinity has capitalized on the opportunity of pent up demand, or 2) that despite the market disadvantage, Trinity has created its own market, spurred by the unique program it offers. In truth, both perspectives are likely relevant, but the rapid expansion of the school in its location is nonetheless remarkable.

Finally, it should be noted that for five or more of Trinity's first thirteen years, Southern California was in the grip of the strongest economic downturn in generations. In the midst of the worst moments of the recession, Trinity's board and staff made a series of bold moves—raising tuition, partnering in a building project, and launching the grades 9-12 program—based on confidence in the mission and God's care for the school and its families.

Among many other factors, these circumstances have prominently demonstrated that Trinity's educational mission, commitment to excellence, and ministry in the community are well-timed and a welcome presence for hundreds of families.

## **The Method**

Partnering with the Trinity community in the strategic planning process, was BetterSchools, LLC, which promotes the importance of collaborative, community-based planning. Though in some quarters this may be growing out of fashion in favor of more executively oriented, top-down planning exercises, we believe that that the potential benefits vastly outweigh the detractions.

More than ever before, parents and students are confronted with the realities of the significance of an independent school investment. On the one hand, selective college admissions and the demands of the workplace are increasingly competitive and complex. In the 21<sup>st</sup> century, students need to be more than well versed in specific subject areas, demonstrating super specialized expertise. They need to be intellectually agile, and their spiritual compasses need to be well calibrated in an increasingly pluralistic culture. Independent Christian schools like Trinity excel at producing well-rounded thinkers and leaders and will continue to lead in this arena.

At the same time, economic uncertainties, rising costs, and competition within the educational marketplace threaten to jeopardize the traditional role of independent schools. If parents are to commit to the financial investment of \$200,000 or more over thirteen or fourteen years of schooling, our schools need to constantly strive to ensure the value of that investment.



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Charting the way forward in comprehensive and constantly updated strategic plans is one of the best ways to help parents to envision the return on their investments. The more collaborative the planning process, the more opportunity parents have to express their interests and to see and hear the impact of their voices in the planning outcomes. Not only does this support the near-term transaction between families and schools, but it can also serve to strengthen trust, deepening the relationships that future prosperity relies upon.

With this interest in mind, we assist school communities in examining the contours of their interdependent relationships by providing stakeholder groups with opportunities to discuss their school. More than a conventional SWOT analysis, our process begins with an appreciation of existing value, leading to the encouragement of visionary thinking on the part of each group.

Focus groups were asked a standard set of four questions:

1. Why are you at Trinity and not elsewhere? (for parents, Why do you keep writing the checks?; for staff, Why are you making your professional investment here?; for students, Why did you decide to stay at Trinity and not go to another school?)
2. What would you like to see more of that would increase Trinity's value to you/your family?
3. What obstacles do you envision that Trinity will need to learn to contend with in the future or get better at handling?
4. In the next 12-24 months, what one thing needs to be resourced and accomplished in the strategic plan?

This foundational aspect of the process is to accurately identify the present value proposition, as it provides the surest basis for future growth and prosperity. For the purpose of this report, we'll call it the Trinity Way.

## **Leadership Contributions to the Process**

In addition to the input of parents, students, faculty and staff, the executive leadership and the board of directors served a vital role in the following areas:

1. Accurately describing the current reality in relation to impulses for improvement or enhancement.
2. Providing real-time assessment of the recognition for improvement needs and progress already underway in those pursuits.
3. Evaluating and balancing the impact of programming, facility, technical, and staffing enhancements to the school's price-point, and the impact on families' abilities to continue to afford a Trinity education.
4. Maintaining and strengthening the core mission of Trinity, even as the applications of the mission evolve and expand.



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5. Ensuring the long-term institutional viability of the school and its mission, in the interest of impacting future generations of students and their families.

Guided by these interests, the board and administrative leadership team engaged in multiple stages of prolonged discussions, evaluating, prioritizing, and endorsing the larger collaborative inputs from the school community to the planning process.

These exercises have resulted in the five-year plan, which will serve as a guide to expanding the application of the school's mission and values, strengthening existing and developing new academic and co-curricular programs, marketing and enrollment management strategies, campus development opportunities, financial planning and management, strategic staffing, and establishing a committed community around the articulated objectives and ensuing results of a Trinity education.

All of this work has been accomplished in the context of Trinity's identity, both as it has been stated since the founding and as it is being experienced by stakeholders in its ongoing evolution and growth.

## **The Trinity Way**

It is a truism in independent school marketing that most parents don't "buy" a school's program as much as they are drawn to a school's culture. The same can be said of both students and professional staff as well. Most students will thrive in an educational environment in which they are challenged, valued, and treated with dignity. Similarly, quality teachers and staff are often on the lookout for a work environment that rewards their strengths, while offering opportunities for creativity and improvement in their craft.

Trinity's missional commitments in both culture and quality of program were on clear display in its relationship with parents, students, and staff.

[For a fuller description of the focus group conclusions, see the Trinity Value Statement.]

## Parents

A note here regarding the participation of Trinity's parent community in the focus group exercise is in order. After more than eight years of consulting with schools of nearly every size and shape across the country, we have not seen as enthusiastic a response to strategic planning focus groups as at Trinity. Our experience has led us to conclude that 50% participation is an extremely strong showing, and that in most schools a strong response of 30-40% is expected. In the three days at Trinity, parents attended sixteen interview sessions, with approximately 75% of families represented. If nothing else, the response should indicate that the Trinity



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community is animated about the future and appreciates the invitation to be part of the planning process.

In digesting the answers to the question “Why Trinity?” we divided the 189 parent responses into six categories, correspondent to the general planning categories that would constitute the strategic plan:

1. Mission/Vision
2. Programming
3. Enrollment/Growth
4. Faculty/Staff Quality
5. Facilities/Finances
6. Community/Partnership

35% of parent comments on the first question were geared toward Programming. Impressively, as valued as the philosophical underpinnings are to parents (23% cited Mission/Vision as their main attraction), execution on the instructional plan with increasing quality won out as the main value proposition.

Not uncommon were comments that started describing one positive initial perception of Trinity that evolved into a deeper appreciation for the school’s overall value. That is, a good number of parents came to Trinity for one thing and found that their experience was much richer and broader than they originally expected.

Reflective of the strength of Trinity’s culture, 30% of comments highlighted Community/Partnership as a primary value.

23% of comments centered on Mission/Vision. While the classical program dominated much of the conversation around programming, spiritual vision and integrity of leadership was the most pronounced theme in this category.

4% of the comments focused on Enrollment, noting especially the attractiveness of small class sizes, individual attention, and access to teachers. 5% noted the quality of the staff, particularly teachers and their attentiveness and professionalism.

## Staff

Like many schools, but to a somewhat greater degree, Trinity’s professional staff is an organic entity, employing a large percentage of parents of students. Added to that is the above mentioned circumstance that many of the core staff and faculty have been with Trinity since its founding or very early on.

Overall, Trinity’s culture and strength of relationships dominated these interviews, with people expressing deeply affectionate perspectives on the impact that Trinity and its people have had on their lives. Along with that, a genuine sense of pride and



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accomplishment was evidenced in the comments, and many expressed appreciation for the opportunity to be part of a successful, counter-cultural project like Trinity.

## Students

One of the focus groups was the Junior class, and their responses to the question “Why Trinity?” were encouragingly consistent. In our experience, students often have the most realistic perspective on a school’s quality, especially the level of consistency between the mission that is “preached” and their daily experience.

Additionally, students have unique insight into whether the focus of a school’s culture is more on them or the adults who run the place. Often, these two criteria determine whether a school can confidently plan to retain students through graduation or experience chronic attrition that undermines viability.

The students cited the entire range of the Trinity experience as their reasons for being a Trinity student from academic quality, to the kindness and support of friends and teachers, to the personal spiritual growth they have experienced.

## **Adding Value**

When asked what stakeholders would like to see more of—more care, more investment, more resources, etc.—that might add to their sense of Trinity’s value to them, their families, or the community at large, the responses fell into categories largely consistent with Trinity’s stated mission and identity, and the pattern of expansion to this point.

One interesting difference in perspective was that parents emphasized additional programming value, while the faculty pressed for more conversation and training around Trinity’s classical priorities. These are certainly not in conflict with one another, but might be understood as variances in perspective regarding Trinity’s present needs. Another notable result was that while facility limitations are clearly evident to everyone, when asked “what would increase Trinity’s value?”, parents noted programming two-to-one over facilities improvements.

The major emergent theme in the parents’ interest in programming had to do with technology. While many of the comments suggested a broad smattering of program interests, more than one-third of parent comments referenced technology or technology related ideas.

## Parents

- Comments regarding programming—50% (36% of which referenced technology-related ideas)
- Facilities—26% (the largest concentration focused on recreation/athletics)
- Community/Partnership—14% (the foremost theme being orientation for newer/younger families to academics, activities, and social bonds)



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## Faculty and Staff

Faculty and staff agreed that greater organizational coordination would enhance their work. The faculty would like to see greater investment in training and planning, and the non-teaching staff expressed a strong interest in continued community building.

## **Strategy**

For the purposes of the planning process, the most important question is the last: “What one thing should be accomplished in the next 12-24 months?” The items expressed for the strategic plan helped to identify the areas in which constituents will expect to see investment and to which they are most likely to commit their own resources and energy to further the mission.

## Parents

Facilities dominated the interviews as the most obvious strategic need. 39% of the parent comments focused on facilities, most long-term regarding the campus, though at least two short-term themes arose: current campus security and transportation.

28% of the parents commenting selected a programming issue as their first priority, possibly reflecting a sense that the school has grown to the point that parents, especially the parents of younger students do not have the benefit of comparison that older families have. That is to say, when a young family walks onto a campus teeming with 500+ students, their expectations are that of a large, well-established school. Their expectations for programming and facilities are not tempered by the historical experience of multiple campuses, each an improvement over the next, co-curricular programs increasing exponentially, and tuition having more than doubled over the past ten years or so.

Clearly, as far as immediate action is concerned, facilities issues are front and center, though they are not all that are on the families’ minds when they consider their place at Trinity.

Also of note in the strategic comments, though the percentage is smaller, is the consistency of the comments regarding class size. The question of growth and its impact on quality and intimacy recurs frequently in the comments on both added value and obstacles. It is clearly significant enough that 10% of the families would like to see the topic addressed in the strategic plan.

## Staff

The staff were not quite as equivocal on the need for facilities. 55% made facilities their number one priority. The faculty also registered their concern about managing a wide academic profile of student in a rigorous college preparatory environment.



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## Students

The Juniors' strategic priorities reflect many students' main concern: the quality of their experience. Their insight was converted in the planning process into gains in student morale, quality of campus life, and other important aspects of school life. Facilities for athletics, quality of faculty, and scheduling issues were most prominent in their comments.

## **Summary and Conclusions**

Trinity Classical Academy is a school community that is clearly experiencing tremendous blessing and the accompanying challenges of growth. Conducting these interviews was an extraordinary experience in many ways. Most notable, perhaps, is that despite the cramped conditions and the inadequacy of some facilities, the community expresses a confident and optimistic perspective on both the present experience and future expectations.

As Trinity founder Liz Caddow said in a speech to classical educators in New England recently, "I believe the calling to start a school grew ultimately out of a hope. A hope for more, for what could be for the next generation in their learning... Overwhelming and encouraging at the same time."

The attractiveness and rapid growth of the Trinity community has required a constant "rapid response" to the demands of staffing, program expansion, and facility needs. Creative half-measures, especially in facilities, have enabled the school to expand in size and scope.

These positive, encouraging developments have come with a price. Whether largely perceived or actual, class sizes in the lower school have been affected by the desire to include more students and families. While exciting and affirming, many parents have asked whether Trinity may need to slow growth in order to learn how to manage the impact of that growth more intentionally. Faculty and staff, enthusiastic about the quality of education they are providing, have asked whether more care should be given to organizational planning and instructional training.

The strategic planning process has afforded the opportunity to step back, take stock, and to further concentrate on a firm foundation for future growth.

While schools may from time to time temporarily arrest physical expansion due to space limitations, Trinity faces the challenge that even with slower growth the present campus does not serve some programming functions adequately.

The need for a new campus configuration will challenge the Trinity community in unprecedented ways, as in the near future significant resources will be required to address the obvious needs.





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As intimidating as these initiatives might seem, they are the by-product of phenomenal blessing. As in any new endeavor, it is impossible to foresee how God will provide, yet the history of Trinity to this point is a clear demonstration that he can and does.



## The Plan

### Section 1—Mission and Vision

Trinity’s educational mission has been characterized by a commitment to do what works to teach children well and to motivate them toward the fulfillment of their potential in their endeavors. Rather than being driven by cultural norms of pre-defining kids’ abilities by aptitude or stage of development, Trinity has sought to include a wide profile of students, providing encouragement and support for a broad range of learners.

At the heart of Trinity’s values lie the effort to produce students of virtue, wisdom, purpose, and courage.

In the discussions around Trinity’s mission, several significant conclusions can be drawn. First, Trinity’s consistent presentation of itself as a counter-cultural balance to conventional educational options remains attractive and a core component of stakeholders’ commitments to the school. Second, as Trinity has grown, questions regarding who Trinity will serve in the long term and how it will be done have surfaced.

The objectives articulated in Section 1 relate to three major questions:

1. What profile of student will Trinity seek to serve?
2. What is the long-term role of the Imago Dei School (IDS)?
3. What is the optimal future enrollment?

These are fundamental questions, with wide-ranging impact on the entire scope of the Strategic Plan, and the objectives determined in attempting to answer them constitute the next five years of strategic activity in this area.

(NB: For the sake of readers, goals in this document are articulated in the past tense, with the expectation that they will be articulated in the future as past accomplishments.)

#### 1.1 Defined who we seek to serve

Trinity has grown at exponential rates, resulting in a highly inclusive environment, consisting of a fairly diverse student body in terms of academic ability, household incomes, and ethnicity. The plan addresses the need to examine the impact of inclusion, accessibility, and diversity on the next generation of Trinity’s life.

- 1.1.1 Examined current assumptions regarding socio-economic accessibility and diversity



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1.1.1a Researched the financial implications of re-defining current caps on need-based financial aid

1.1.1b Researched the enrollment management implications (challenges and benefits) of modifications to financial aid policies

Success Indicator:

- A policy exists that clarifies and/or re-defines the greatest percentage of family financial need for which accessibility can be provided

Timeline: **January 2018 (TO BE WORKED ON THIS FALL)**

## 1.2 Determined the long-term role of IDS

The founding of IDS has added a layer of academic, social, and institutional benefits and challenges to the Trinity experience. Ongoing funding of IDS is of concern, as is the role of IDS in providing students with end of high school credentials and services beyond their formal high school years.

1.2.1 Explored opportunities to grow and market IDS

1.2.1a Designed and launched an IDS-specific website

1.2.1b Explored the impact of lengthening the IDS school year to include summers

1.2.1c Established dedicated fundraising and marketing activities for IDS

Success Indicator:

- A unique IDS website is operational

Timeline: **August 2015 to July 2017 (COMPLETED & ONGOING)**

- A multi-year plan exists as a guide to expansion, including cost, price, and staffing effect on the overall budget
- Staff have been hired to pursue IDS funding through a variety of potential public/private sources

Timeline: **August 2018**

1.2.2 Established “certificate of completion” requirements for IDS students and post-completion service options

1.2.2a Explored and evaluated potential partnerships with existing services for young adults

1.2.2b Identified the bridge for post-completion support services through community partners

1.2.2c Established annual transition planning services for students and parents beginning in 10<sup>th</sup> grade



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## Success Indicators:

- Course sequence(s) and completion credits published
- IDS staff have proposed potential viable public/private partnerships to support IDS post-secondary students
- A written description exists of bridge options for students depending on the direction that parents would like for students to pursue
- Parents of 10<sup>th</sup> grade students participate in a transition planning meeting to evaluate future educational/vocational options and to choose a track for preparation

Timeline: August 2015 to August 2017 **(COMPLETED & ONGOING)**

## 1.3 Determined Optimal Enrollment

### Current Reality:

While growth is desirable, the pace and management of growth would be better served with a long-term target enrollment to which are attached concrete objectives throughout the Strategic Plan.

1.3.1 Adopted five-year enrollment goal of 756 as maximum, steady enrollment (TK-12, 3 sections of each at an optimal enrollment of 18 students per class, not including Imago Dei)

1.3.1a Adopted five-year enrollment goal for Imago Dei (in addition to optimal 756)

1.3.1b Adjusted campus plans to the goal

1.3.1c Adjusted pricing models to the goal

1.3.1d Adjusted staffing models to the goal

### Success Indicators:

- A board approved policy exists targeting a specific range of enrollment (optimal of 756 plus) beyond which Trinity will not grow without a formal policy amendment, based on the capacity to serve more students
- Facilities, pricing, and staffing models are reflected in both the Strategic Plan and in the strategic financial modeling

Timeline: August 2016 **(COMPLETED & ONGOING)**



## Section 2—Student Programming

As noted in the introduction, a plurality of comments from parents regarding the value of Trinity to their families referenced programs. Some commended specific programs, while others commented on their general sense that excellence is the goal in everything that goes on at Trinity.

This attention on programming held true in the strategic priorities conversations, assisting the staff and board to narrow down the nearly infinite range of options to include those programming topics that recurred most frequently. These priorities complement goals that the administration have either begun progress on already or that they have known ought to be in a long-range plan.

Over the next five years, progress will be gauged in an ambitious seven areas of program growth or improvement:

1. Fine Arts
2. Athletics
3. Student Recognition
4. Advanced Science and Technology Curriculum
5. Academic Diversity/Learning Support
6. Scope and Sequence
7. Student Services

(These are not listed in any particular order of importance, but merely the order in which they were addressed in the planning process, primarily due to scheduling and the availability of staff for the work sessions. Prioritization is determined by the dated timelines.)

The strategic objectives in this section of the plan reflect that Trinity is rapidly maturing from start up mode to a balance of new initiatives alongside refinement of existing programs.

### 2.1 Fine Arts

Trinity's Fine Arts program will receive a major boost in the next five years in the form of full-time staffing, program expansion, and more specialized activities reflective of the broad interests and talents within the student body.

#### 2.1.1 Trained Fine Arts teachers in subject specific classical instructional techniques

##### Current Reality:

Fine Arts teachers (most of whom teach part-time, because they work professionally in their artistic fields) currently participate in general orientations and training



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opportunities along with regular classroom teachers. Fine Arts-specific training has not yet been made available as part of their regular professional development.

Success Indicators:

- Fine Arts teachers are provided specialized pedagogical training and classical professional development within their field on an annual basis

Timeline: June 2016 (IN PROCESS/ONGOING)

2.1.2 Designed curriculum to allow for/to produce cumulative individual progress and program development

Current Reality:

Fine Arts classes are designed to be applicable mostly to each division (i.e., Grammar School, Logic School, Rhetoric School), and students are not able to begin intensive study or practice in programs that will lead to performance over several years at an elite level.

2.1.2a Launched advance theater course

Timeline: AUGUST 2017 – ADJUSTED TO ALLOW FOR ADDITIONAL INSTRUMENTAL ELECTIVE PER ENROLLMENT DEMANDS

2.1.2b Launched advanced studio art course(s)

Timeline: August 2017 **ADJUSTED TO ALLOW FOR AN ADDITIONAL ADVANCED PLACEMENT ELECTIVE – AP MUSIC THEORY – FOR STUDENTS PURSUING MUSIC PROGRAMS IN COLLEGE**

2.1.2c Launched advanced choral course

Timeline: August 2018

2.1.2d Launched Rhetoric School orchestra in addition to GS/LS orchestra

Timeline: August 2019

Success Indicators:

- Students will be able to prepare and audition for specialized advanced Fine Arts activities offered on a cumulative, sustainable basis

2.1.3 Improved support for potential arts majors through the Fine Arts department and College Guidance



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## Current Reality:

Students have access to a robust College Guidance program, but a strategic approach to admission to selective Fine Arts programs is as of yet undeveloped.

## Success Indicators:

- Talented students have access to a four-year Fine Arts college admission/scholarship guidance program
- In-house and external resources have been identified and incorporated into the guidance program

Timeline: August 2018 **(COMPLETED & ONGOING)**

2.1.4 Implemented a coordinated communication plan for Fine Arts and Athletics

## Current Reality:

Parents and students sometimes find themselves with scheduling conflicts and communications breakdowns regarding the activities of students attempting to participate in both Athletic and Fine Arts activities.

## Success Indicators:

- The Fine Arts and Athletic Directors meet on a monthly basis and communicate commonly to teachers, coaches, arts directors, parents, and students regarding scheduling conflicts and solutions

Timeline: August 2015 **(COMPLETED AND ONGOING)**

2.1.5 Established an over-arching co-curricular conservatory program

## Current Reality:

GS and LS students who desire lessons or activities outside of the regular school day other than strings must get them elsewhere.

2.1.5a Established a co-curricular theater program

2.1.5b Established an instrumental private/group lesson program

2.1.5c Expanded co-curricular visual art program

2.1.5d Incorporated GS vocal music ensemble program into conservatory

## Success Indicators:

- LS and RS students can participate in after-school drama productions
- GS students are offered non-stringed instrumental lessons on campus
- LS/RS students are offered art lessons on campus
- Music enrichment program managed as part of the conservatory



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Timeline: August 2015 through August 2017 (**LAUNCHING AUGUST 2017!**)

2.1.5e Hired a conservatory director

Timeline: August 2017 (**DELAYED UNTIL FULL NEED IS DEFINED. HIRED ASSISTANT TO DIRECTOR OF FINE ARTS TO HELP WITH ADMINISTRATIVE DETAILS REGARDING CONSERVATORY**)

2.1.6 Increased part-time Fine Arts Director to full-time

Timeline: August 2016 (COMPLETED)

2.1.7 Established and hosted an annual Fine Arts Awards Banquet

Timeline: May 2015 (COMPLETED AND ONGOING)

2.1.8 Expanded pep music program to include summer training

Success Indicators:

- Drum line and pep band participants meet for a one-week summer camp to prep for Fall athletic season

Timeline: August 2016 (IN PROCESS)

2.1.9 Logic School and Rhetoric School students participated in three or more local and/or regional Fine Arts competitions each year

Current Reality:

LS and RS students participate in one annual artistic competition.

Timeline: June 2018 (**COMPLETED – FORUM MUSIC FESTIVAL**)

## 2.2 Athletics

One of Trinity's strongest and most attractive program pieces, the Athletic Department will focus its efforts in the next five years on establishing vertical alignment within sports programs, increasing coaching capabilities, improving organization and communication, and developing student-athletes' overall strength and versatility.

2.2.1 Established a year-round speed, strength, agility program

Success Indicators:

- LS and RS students can participate in an organized daily conditioning program with professional supervision





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Timeline: August 2020 (OCCURRING)

2.2.2 Converted Little Knights from league play into intramural clinics

Timeline: August 2015 (COMPLETED AND ONGOING)

2.2.3 Established specific development plans for students with interest in college athletics

Success Indicators:

- Students and families are connected to outside entities that can direct and advise regarding college goals

Timeline: August 2015 (COMPLETED AND ONGOING)

2.2.4 Drafted a three-year comprehensive Athletics program plan

Current Reality:

Presently there is no official framework from which students and parents can anticipate Athletic program expansion plans

2.2.4a Delineated conditions and criteria for additional sports programming

Success Indicators:

- Students and parents will have a published guide to plans for additional or enhanced programming
- Students and parents will have a published guide to what qualifies a new activity for consideration by the Athletic department

Timeline: August 2016 (COMPLETED AND ONGOING)

2.2.5 Created curriculum continuity between Athletics and PE

Current Reality:

Sports programs and PE curriculum are determined independent of each other

Success Indicators:

- PE teaches transferable skills to Trinity sports
- Sports programs and coaching responsibilities are structured to include a skills development “curriculum”

Timeline: August 2016 (COMPLETE)



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## 2.2.6 Delineated varsity coaches as “program directors”

### Current Reality:

Varsity coaches have little or no responsibility for junior varsity or LS programs in their own sports

### 2.2.6a Compensated varsity coaches as “Program Directors”

#### Success Indicators:

- Varsity coaches have responsibility for training and performance in their sport school-wide
- Varsity coaches are paid an additional stipend to train and supervise lower level coaches in their programs

Timeline: Ongoing to June 2020

## 2.2.7 Designed plan for Imago Dei integration in Athletics

Timeline: August 2015 (COMPLETED AND ONGOING)

## 2.2.8 Mirrored coaching performance evaluation to formal faculty observations and protocols

### Success Indicators:

- Coaches are provided with a simple, formal evaluation based on firsthand observations and parent/student satisfaction surveys at the conclusion of each season

Timeline: June 2016 (COMPLETED AND ONGOING)

## 2.2.9 Constructed a parent/student satisfaction survey protocol

### Success Indicators:

- Parents and RS students are surveyed at the conclusion of each season regarding Athletic administration, coaching performance, and overall quality of experience

Timeline: May 2016 (COMPLETED AND ONGOING)

## 2.2.10 Defined Athletic lettering criteria

### Success Indicators:

- Lettering criteria published in Athletic Handbook
- Letters awarded annually to qualifying student-athletes



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Timeline: August 2015 (COMPLETED AND ONGOING)

## 2.3 Student Recognition and Awards

2.3.1 Evaluated current award system and proposed improvements relative to the Trinity mission and core values

Timeline: Ongoing to June 2020

## 2.4 Advanced Science and Technology Curriculum

Trinity has steadily sought to increase the quality of curriculum and instruction across all disciplines since its founding. In the integrated areas of math and science, LS and RS courses are coordinated, and students are able to pursue advanced math coursework at varied paces, depending on a number of individualized factors. The Grammar School recently adopted a new math program with the goal of teaching students to think more mathematically.

At the same time, innovative technology provides opportunities to enhance some aspects of instruction, and college bound students are entering a highly digitized environment for which Trinity wants them to be well prepared.

The Strategic Plan also aims to address the question of the place of advanced scientific learning in a classically oriented curriculum, and, further, how Trinity will intentionally prepare students for influential roles in shaping the landscape of scientific thinking at an elite level, impacting the landscape of our culture for God's Kingdom.

2.4.1 Designed and incorporated college-ready "digital life" elements into RS courses.

Current Reality:

Technology is deployed by teachers on an individual basis to meet their own instructional needs. Technology interfaces for students are occasional and not incorporated into most course descriptions.

2.4.1a Designed and incorporated programming-based courses or units

2.4.1b Established expectations for faculty-student interactions using more technology for efficiency and practice

Success Indicators:

- Integrated elements of digital life are built into relevant RS courses, beginning in 10<sup>th</sup> grade
- Faculty and students exchange ideas and information increasingly through digital formats



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Timeline: August 2017 **(IN PROCESS)**

2.4.2 Enhanced digital elements and advanced study in currently offered film courses

Success Indicators:

- Course syllabus is revised to include digital elements of direction and production

Timeline: August 2017 **(IN PROCESS)**

2.4.3 Evaluated the academic benefit of LS Science Fair

Success Indicator:

- A faculty-researched study articulates the academic pros and cons of science fair in the context of best science instructional practices and Trinity's classical distinctives

Timeline: August 2016 **(COMPLETED)**

2.4.4 Articulated a philosophy of advanced scientific study in the context of Trinity's classical and Christian mission

2.4.4a Researched the role of K-12 schools in preparing students for influential positions within the scientific community

2.4.4b Benchmarked K-12 science scope and sequence to top college preparatory and/or magnet schools with exceptional track records for placing graduates in elite university science programs

2.4.4c Consulted with four elite universities to collect recommendations for admissions preparation, course preferences, and college guidance

2.4.4c Developed a plan to prioritize STEM-related instructional facilities, including possible external funding through STEM grants

Success Indicators:

- Published a "white paper" specifically articulating a mission statement regarding the relationship between scientific study and future cultural influence
- Proposed revisions to scope and sequence and college guidance to better align with elite outcomes
- Future campus plans include prioritized building of STEM-related facilities



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Timeline: August 2016 through August 2018 (IN PROCESS)

## 2.4.5 Expanded advanced science course offerings

2.4.5a AP Chemistry offered

Timeline: August 2015 (COMPLETED AND ONGOING)

2.4.5b AP Biology offered

Timeline: August 2018

## 2.4.6 Actively considered and planned for additional elective RS science classes as enrollment grows and capacity is available.

Timeline: Ongoing

## 2.5 Academic Diversity and Learning Support

As noted in Section 1—Mission and Vision, Trinity has always been an inclusive environment, providing high quality schooling for a wide profile of students. This fact, combined with the generational statistical realities of high percentages of students with learning differences and disabilities, requires that high academic expectations be accompanied by active support of students' potential.

Over the next five years, the goal will be to study the needs of students in greater detail, with the goal of providing more both effective and efficient support for admissible students.

### 2.5.1 Evaluated new math transition class for lower performing 9<sup>th</sup> grade students

Success Indicators:

- Faculty have made the case to either keep or jettison the course
- Faculty have recommended that students in need of the course's remediation goals either continue to be admitted or should be denied admission

Timeline: June 2015 (COMPLETED AND ONGOING)

### 2.5.2 Explored support options for learning disabled students in the context of content scope and sequence

Current Reality:

Students who present with learning disabilities are presently required to take all of the same courses at the same pace as students without disabilities (with the



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exception of math, beginning in the LS) in order to pass from grade to grade or to graduate.

2.5.2a Evaluated the impact of creating alternate course sequences for learning disabled students in LS and RS

2.5.2b Explored the feasibility of a class for students in grades 2-5 to address academic remediation and/or therapy for learning differences

Success Indicators:

- A report will outline the practical costs and benefits of modifying course sequences and/or graduation requirements for LS and RS students
- A report will outline the value and cost of placing younger students with learning differences not severe enough to qualify for IDS-level services in a class of 8-10 for alternate instruction in core subjects

Timeline: June 2017 to June 2018

2.5.3 Incorporated an additional three-year track of Latin for newly enrolled RS students

Timeline: August 2015 (COMPLETED AND ONGOING)

## 2.6 Scope and Sequence and WASC Accreditation

2.6.1 Updated the GS scope and sequence per Western Association of Schools and Colleges (WASC) renewal recommendations

Timeline: June 2016 (**COMPLETED**)

## 2.7 Student Services

With four graduating classes having successfully passed from Trinity to college, and with larger class sizes beginning to swell the ranks of the Rhetoric School, student services become an increasingly important part of the value that Trinity provides to students and families. In the next five years, enhancements will be made in personal student interactions with faculty, college guidance, and college admission test preparation.

2.7.1 Trained staff in basic counseling, personal crisis intervention techniques

Success Indicators:

- All faculty and staff are provided with annual training



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Timeline: **JANUARY 2018 (ADJUSTED TIMELINE)**

2.7.2 Revised communication plan for 9<sup>th</sup>-11<sup>th</sup> grade college guidance

Current Reality:

College guidance has been primarily focused on the application and selection process for seniors

2.7.2a Developed resources to help parents navigate college funding and financing systems

2.7.2b Evaluated how co-curricular and outside activities affect college admission opportunities

2.7.2c Proposed a timetable for the adoption of Naviance software in college advising

Success Indicators:

- **A guide to preparing for college is published and distributed to parents and students in 9<sup>th</sup> grade**

Timeline: August 2015 to August 2017 **(ONGOING)**

2.7.3 Re-instituted PSAT/SAT orientation for parents

Current Reality:

A previously initiated program of active support for understanding the college admission testing process has been discontinued

2.7.3a Benchmarked in-house test prep results

2.7.3b Explored ways to increase SAT test prep, including early intervention

Success Indicators:

- Parents in grades 9-11 are presented with PSAT programming distinctives and test score orientation annually
- A list of additional services and opportunities, both in and out of school, are presented to students and parents

Timeline: June 2016 **(COMPLETED & ONGOING)**

2.7.4 Determined scaled college counseling resources for growth from classes of 25 to 36 to 50



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- 2.7.4a Assigned responsibility for liaison between SSP students and college advising
- 2.7.4b Increased research capabilities for scholarship opportunities relative to student interests and academic performance

## Success Indicators:

- Strategic plan includes incremental increases in staffing to maintain an effective ratio of students to college counseling staff
- A job description contains the responsibility to coordinate college counseling for SSP students
- A staff person meets with each Senior family to advise regarding relevant scholarship opportunities
- **Added Dual Credit & Scholarship Coordinator resulting in Trinity offering 17 dual credit courses, enhancing college acceptances as well as resulting in earlier college graduation for students**

Timeline: June 2016 (**COMPLETED & ONGOING**)

- 2.7.5 Established relationships with science and engineering-oriented colleges and universities

## Success Indicators:

- Students are being recruited by at least five notable colleges for STEM-related majors

Timeline: June 2019 (FOCUS AREA)

## 2.8 Other Co-curriculars

As enrollment grows, and as student interest warrants, the Strategic Plan envisions an intentional effort to expand competitive academic co-curricular programs. The program goals in this section are based on the anticipated growth, but they are subject to future enrollment conditions.

- 2.8.1 Developed Mock Trial into a dominant program

- 2.8.1a Funded Mock Trial on par with other competitive co-curriculars (including Athletics)

- 2.8.1b Incorporated Mock Trial as an elective RS course





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## Success Indicators:

- Mock trial team makes the leading tournament and qualifies to compete nationally on an average of every other year
- Hired teacher to lead Mock Trial program development over a five-year period
- Students can elect Mock Trial as a course for credit

Timeline: FALL 2016 (ADJUSTED TO BEING A CLUB, RATHER THAN AN ELECTIVE, TO MAXIMIZE STUDENT PARTICIPATION)

## 2.8.2 Instituted no less than three additional academic competition programs

2.8.2a Polled students, parents, and faculty to determine interest in various academic competitive options

- **Added Science Olympiad 2016**

Timeline: **JANUARY 2018 (COMPLETED)**

2.8.2b Approved specific targeted activities for program development

- **Adding Team America Rocketry Challenge**

Timeline: **AUGUST 2017**

2.8.2c Hired staff to sponsor/coach approved activities in a sustainable, three to five year timeframe.

Timeline: JUNE 2017



## Section 3—Enrollment

A consistent theme of the planning process was the combined impressiveness and challenge of near-constant enrollment growth. With the Strategic Plan’s call for the adoption of an optimal enrollment target, a benchmark has been established which will aid in the pursuit and management of specific enrollment goals.

- 3.1 Precisely modeled enrollment growth from present to optimal enrollment of 756, including annual benchmarks in recruiting, retention, gross attrition, and net growth

Success Indicators:

- A document exists mapping the most likely scenarios to optimal enrollment

Timeline: January 2017 (**ADJUSTED TO ALLOW FOR NEW ENROLLMENT/MARKETING PLAN UTILIZING INBOUND MARKETING/SOCIAL MEDIA PLAN**)

- 3.2 Increased staffing for admissions/enrollment management functions

3.2.1 Hired two FTE administrative assistants

- **Adjusted to hire new International Student Coordinator to manage international enrollment opportunity**

Timeline: June 2016 to June 2017 (**IN PROCESS**)

- 3.3 Develop detailed enrollment plan for optimal enrollment related to the international student.

Success Indicators:

- A document exists mapping the most likely scenarios to optimal enrollment

Timeline: August 2018



## Section 4—Staffing and Organization

With a target optimal enrollment established, Trinity will continue to expand its staff, correspondent especially to the programming goals articulated in Section 2 of this document.

As is natural in schools that are growing through the threshold of 500+ students toward an even more sustainable enrollment plateau of 750, greater direct supervision of programs is required. This often has the effect of converting a relatively flat organization of general administrative function to a more vertical organization with a greater number of specialized functions, each reporting up a chain of authority.

Two key elements aid in ensuring that these new positions are productive and efficient: 1) a well-designed Strategic Plan that defines the roles in terms of goals and outcomes, and 2) a carefully constructed Organizational Chart that reflects both positions and functions, so that any redundancies or confusion regarding responsibility can be identified and corrected.

(NB: This version of the Strategic Plan does not include all of the anticipated positions, focusing instead on the organizational structure that will facilitate a well-managed human resource environment.)

### 4.1 Administration

4.1.1 Designed and published a functional organizational chart alongside an expanding conventional org chart, for both current administration and future planning

#### Current Reality:

The org chart represents positions and lines of authority, but does not specifically designate the organizational function of each position nor provide a roadmap for future staffing needs.

#### Success Indicators:

- An organizational chart exists that delineates current lines of authority, communication, and areas of functional responsibility for each paid position

Timeline: **SEPTEMBER 2016 (COMPLETED)**

- An organizational chart exists that maps out possible effects on staffing including expanded positions, consolidated roles, re-designed functions, over a three to five year period

Timeline: **JANUARY 2017 (COMPLETED)**



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4.1.2 Presented a multi-phased re-organization of part-time staffing structure to adjust to growth, productivity, and cost-effectiveness

**Current Reality:**

A significant percentage of administrative staff are part-time workers, some of whom job share with others within the same function.

4.1.2a Analyzed each position to determine overall productivity and to identify redundancies in responsibilities

Timeline: OCTOBER 2016 AND ONGOING

4.1.2b Analyzed the effect of consolidating part-time positions into full-time positions on overall compensation costs and the school's price-point

Timeline: OCTOBER 2017 **(COMPLETED & ONGOING)**

4.1.2c Proposed a three-year plan to consolidate those positions for which there is sufficient reason to move to full-time

Timeline: January 2017 **(COMPLETED & ONGOING)**

4.1.3 Examined the faculty compensation schedule to determine where greater investments may be necessary and/or possible for recruiting and retaining high-impact teachers

**Success Indicators:**

- Compensation budgets reflect variances in compensation based on strategic investments in highly qualified individuals and/or difficult to place positions

Timeline: June 2017 (UPPER SCHOOL COMPLETED, **GRAMMAR SCHOOL COMPLETED MAY, 2017)**

4.1.3a Re-articulated total compensation considerations and messaging in reference to fringe benefits (e.g., tuition remission, insurance, retirement)

Timeline: June 2016 (COMPLETED)



## 4.2 Technology

4.2.1 Surveyed college preparatory schools of similar size regarding optimal tech staffing for desired tech capacity (see Section 5—Facilities and Financing)

### Current Reality:

The Strategic Plan calls for major upgrades in both hardware and software over five years, and the optimal staffing to maintain the tech infrastructure is unknown.

4.2.1a Established target tech staffing for 2017-2020 expansion

### Success Indicators:

- A benchmarked staffing plan has been proposed to be incorporated into a four-year budget model

Timeline: June 2016 **(AREA OF FOCUS/IN PROCESS)**

4.2.2 Upgraded Student Information System software and staffing

4.2.2a Transferred registrar responsibilities from tech staff to academic/division staff **(ADJUSTED REGISTRAR TO ADMISSIONS DEPARTMENT)**

4.2.2b Hired a full-time network manager

Timeline: June 2017 **(COMPLETED)**

## 4.3 Professional Development

4.3.1 Implemented enhanced performance evaluations for faculty, administration, and non-instructional staff

### Current Reality:

All staff receive annual evaluations based primarily on direct observations of work by their supervisors.

4.3.1a Implemented anonymous student reviews of teacher performance

### Success Indicators:

- Students in grades 9-12 have contributed anonymous standard reviews of their teachers to the administration annually
- Student reviews have been entered into teachers' files
- Review results are discussed in annual performance evaluations



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Timeline: June 2016 **(COMPLETED & ONGOING)**

## 4.3.2 Improved focus of professional development opportunities for faculty and staff

### Current Reality:

Professional development is determined and conducted annually for faculty based primarily on the initiative of senior administration.

4.3.2a Committed to a three-year goal to increase spending on professional development to 1.5% of the annual budget

Timeline: October 2019

4.3.2b Commissioned an inter-school (GS/LS/RS) professional development team of faculty to design and implement in-house training

4.3.2c Faculty evaluated professional development opportunities and programs annually

### Success Indicators:

- Annual budget reserves 1.5% for professional development
- Faculty conduct primary professional development each year (OCCURRING)
- Faculty are surveyed to evaluate quality of professional development

Timeline: June 2016-June 2019 (AREA OF FOCUS)

## 4.3.3 Increased staffing for faculty mentoring

### Current Reality:

Two faculty are designated to mentor new or recently hired faculty.

4.3.3a Appointed one additional teacher in each school to mentor new faculty

- **ADDED DEAN OF CLASSICAL EDUCATION & INSTRUCTION TO HELP IMPLEMENT AND ASSIST IN PROFESSIONAL DEVELOPMENT TRAINING**

Timeline: August 2017 **(IN PROCESS)**

## 4.3.4 Trained every teacher on RenWeb capabilities



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## Current Reality:

Standard training for teachers is focused on minimal administrative functions and largely ad hoc.

- 4.3.4a Staffed tech training position
- 4.3.4b Designed Trinity-specific tutorials

Timeline: August 2016 (ONGOING)

## Success Indicators:

- All faculty and academic staff are able to navigate and use the wide range of functions within RenWeb

4.3.5 Evaluated and reported on the causes of variable teacher performance in basic course management (e.g., planning, grading, communication)

- 4.3.5a Surveyed the faculty regarding their sense of preparedness, availability of resources, and accountability in core course management areas

Timeline: SPRING 2017 (ONGOING)

- 4.3.5b Adjusted management of training and/or accountability to address gaps in consistency

Timeline: June 2016 (ONGOING)



## Section 5—Facilities and Finances

As noted in the introduction, Trinity’s day-to-day financial position has been helped over the years by bold decisions regarding tuition levels, campus projects, and a predictable stream of revenue from well-attended and well-supported events. As this planning process commenced, Trinity stands at a crossroads regarding future campus planning. Regardless of which direction seems most expeditious, the expense will be significant, and that reality is reflected in the objectives in this section.

Additionally, in order to respond to the community interest in increased technology instruction and capabilities, as reflected in Section 2, a major investment in technology infrastructure will be pursued over the next five years.

### 5.1 Acquired a campus that is completely or largely controlled/owned by the school and functional at optimal enrollment

#### Current Reality:

The present campus is at near capacity, with civic pressure mounting regarding the use of portable buildings and space in the permanent leased facility maxed out. Over the past year, multiple potential solutions have been explored simultaneously, but at publication, none have become the clear best option.

#### 5.1.1 Adjusted campus plans to optimal target enrollment of no less than 756 students, not including IDS

#### Success Indicators:

- Next phase campus designs provide for full programming at an optimal enrollment of 756 students by 2020
- Next phase campus designs provide for IDS-specific instructional and programming needs

Timeline: June 2016 (IN PROCESS)

#### 5.1.2 Raised \$5 million to facilitate campus planning and/or acquisition

#### Current Reality:

This would be the first multi-million dollar campaign in Trinity’s history.

#### 5.1.2a Began exploration of early campaign strategy with potential major donors

Timeline: June 2015 (IN PROCESS)





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5.1.2b Proposed and adopted a three to five year strategy for a major capital campaign

Timeline: January 2016 **(OCCURRING & IN PROCESS)**

## 5.2 Improved Technology Infrastructure and Capabilities

5.2.1 Acquired a new Apple cart

Timeline: August 2015 **(COMPLETED)**

5.2.2 Upgraded network systems

5.2.2a Upgraded main server

5.2.2b Upgraded wireless relay to portables

5.2.2c Ran new Ethernet wiring between portables

Success Indicators:

- Network traffic handled with greater stability and reliability
- Network access in portables guaranteed

Timeline: August 2015

5.2.3 Provided computers/devices/connectivity to all faculty and staff campus wide

Timeline: August 2016 **(ONGOING)**

5.2.4 Installed and established active protocols for campus-wide content filtering

Current Reality:

Student access to the network and internet is limited due to inadequate content filtering capabilities.

Success Indicators:

- Network administrators will be able to reliably prevent and allow access to appropriate sites at multiple levels of sensitivity and functional need
- Network administrators will be able to monitor network use in real time
- Students will be free to use the network for internet access without significant concern for misuse

Timeline: Beginning August 2015, ongoing through 2018 **(IN PROCESS & ONGOING)**



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5.2.5 Outfitted each classroom with document projectors or other desired instructional technology

Timeline: October 2018

5.2.6 Negotiated for a free fiber optic dedicated line

Timeline: Pending campus plans

5.3 Established new generation of policies regarding revenue and cost

5.3.1 Facilitated the ability to recruit 100% of donated funds toward non-operational, capital, or endowment funds or campaigns

5.3.1a Adopted pricing policy of 105% of annual operating cost

5.3.1b Established a permanent reserve fund equal to 15% of a three-year average total operational budget

Timeline: August 2020

5.3.2 Implemented formal policy of average class size of 18 students school-wide (schedule of implementation in Grammar School to be determined by facility capacity) Optimal and maximum class sizes will vary based on year and subject but school-wide average will be at 18 or lower.

Current Reality: Grades 7-12 implemented optimal targets of 18 starting in 2014, and 33% of GS classes are within the optimal range as of 2015, with active planning for total implementation.

Timeline: August 2019 (expected)

5.3.3 Estimated 3 to 5-year impact of property ownership on operational costs

Timeline: Pending campus design

5.3.4 Incorporated true long-term health care costs into the cost/price model

Timeline: October 2017 **(IN PROCESS, CHANGING & ONGOING)**



## Section 6—Community and Partnership

At the conclusion of the initial focus group exercise in the Fall of 2014, a stunning realization was made. Of the hundreds of comments and suggestions made by parents, staff, and students, there was little to no criticism of Trinity’s institutional communication or transparency. This is clearly a remarkable strength and deserves to be understood and preserved. Beyond the mechanics of the communication and marketing plans, the question should be answered: What about the philosophy of community has led to this school-wide sense of “being in the know” and the accompanying confidence in the school’s leadership and direction?

A consideration to come out of the planning exercises is that of Trinity’s role in the larger community and its inhabitants. As Trinity increases its visibility within the Santa Clarita Valley, how will the school model for students that the Trinity community is influencing its society beneficially and not just preparing them to be a future benefit.

6.1 Studied and documented Trinity’s unique attributes of community transparency

Timeline: June 2017

6.2 Established a meaningful sustained role in the larger community

6.2.1 Evaluated the community resources with an eye to applying those to needs and opportunities beyond Trinity

6.2.1 Recruited a committee of parents, students, and faculty to propose activities and services to be provided

6.2.3 Established two to three annual events or initiatives designed to include Santa Claritans in a public and significant way

Timeline: June 2020