

# 2014 STRATEGIC PLAN

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ADVANCING ACADEMIC EXCELLENCE

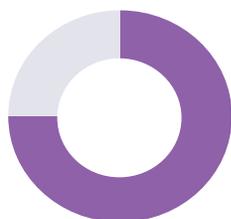
FALL 2018 UPDATE



# EXECUTIVE SUMMARY: OUR PROGRESS ON EMERGING PRIORITIES

## TEACHING & LEARNING FOR THE CURRENT CENTURY

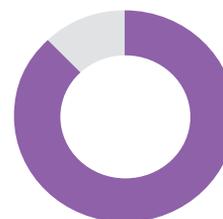
We will refine and implement an educational program that prepares students for the challenges and opportunities of the 21st century.



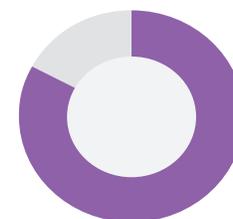
PROGRAM



CLASSROOM PRACTICE



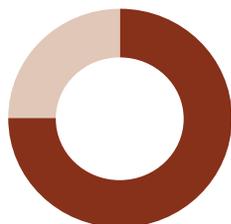
STUDENT ASSESSMENT



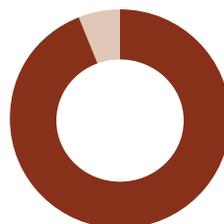
STRUCTURES & SUPPORT

## RETHINKING TIME & SPACE

We will continue to develop our campus so that it supports great teaching and learning and reflects the school's values.



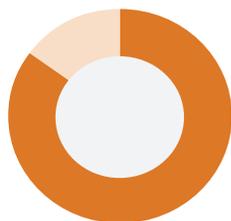
TEACHING & LEARNING



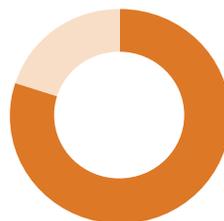
COMMUNITY

## BROADENING & STRENGTHENING OUR COMMUNITY

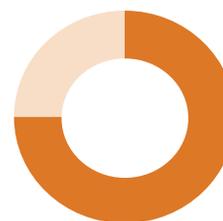
We will cherish and bolster the connections with our multiple communities who bring vibrance and diversity to our school.



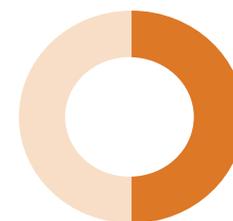
INCLUSIVITY



OUTREACH



CONNECTIONS



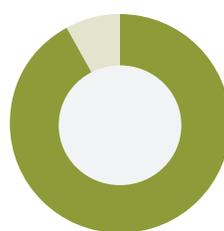
EVALUATE PROGRESS

## BUILDING ON FINANCIAL EXCELLENCE TO SUPPORT THE PATH FORWARD

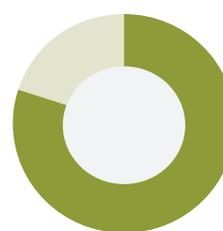
We will achieve our goals in a financially responsible and sustainable manner, all the while keeping Mark Day School on sure and steady financial ground.



PHILANTHROPY



TENSIONS



GROWTH

# TEACHING & LEARNING FOR THE CURRENT CENTURY

We will refine and implement an educational program that prepares students for the challenges and opportunities of the 21st century. We will seamlessly weave traditional disciplines of math, science, humanities, world languages, the arts, and athletics with four cross-disciplinary literacies: cross-cultural literacy, ecological literacy, media and information literacy, and social and emotional literacy. We will infuse pedagogical tools throughout the school to support hands-on projects, varied learning styles, and student-centered inquiry.

# PROGRAM

We will continue to refine and implement an educational program that prepares students for the challenges and opportunities of the current century, strengthen the coherence of the educational program as a whole, and fully integrate foundational skills and concepts with the four cross-disciplinary literacies.

## 2014 EMERGING PRIORITIES

Develop and implement scope and sequence for each cross-disciplinary literacy throughout the grades.

Develop, pilot, and integrate programs that emphasize STEM skills and competencies, design thinking, problem-solving, and hands-on building and making.

Strengthen and weave the visual and performing arts more fully throughout the program to foster all students' creativity and self-expression.

Incorporate recommendations of the 2013-14 World Languages program review as a vital step in our commitment to cross-cultural literacy.

Educate the parent community about the program vision.

## 2018 UPDATES

**In process.** Faculty members have been engaged in a multi-year curriculum review and design process. During the first year, long-term transfer goals were developed in the four cross-disciplinary literacies. These have guided further development of a more detailed K-8 scope and sequence in these disciplines, and will continue to shape future assessments and become a foundational aspect of teacher evaluation and professional growth.

**Accomplished.** Faculty have worked with the best thought leaders and practitioners in the field, including educators from the Stanford d.school, the Stanford Graduate School of Education, the Exploratorium, and Tinkering School to develop an exceptional design and tinkering program that is unique to Mark Day. Since 2014, integrated projects have been implemented across the school from K-8, and a variety of additional opportunities exist at lunch and after school for students to design and create.

**In process.** The Arts department faculty and division heads, in response to the 2015 Arts Curriculum Review, defined a draft arts mission statement, visited peer schools in the area to explore assessment and scheduling systems to develop ideas, and continue to explore how best to deliver arts instruction in grades 6-8. Arts faculty have revised the metacognitive skills they aim to teach and assess in all grades to align with schoolwide assessment work in this area.

**Accomplished.** The World Language faculty has revised the scope and sequence for language teaching using the ACTFL guidelines and their own work in assessment development. Faculty have incorporated best practices through ongoing training in comprehensible input, standards-based assessment, proficiency-based instruction, and oral proficiency interviews. The team has piloted e-portfolios and new proficiency-based rubrics in grade 6 and plans to widen the use of these across the curriculum moving forward. They continue to host an annual professional workshop on best practices, which advances their own learning and provides a learning venue for teachers across the Bay Area. Finally, the team has committed to providing a summer orientation week for all new students entering the school each fall.

**Ongoing.** We continue to educate parents and guardians about the program vision throughout the year through heads' coffees, Parents' Association meetings, the Hip Pocket News, blog posts, Mark Day Moments videos, and printed pieces like the Curriculum Guide and The Marker.

# CLASSROOM PRACTICE

We will continue to evolve classroom practice and pedagogy. Guided by educational and brain research and innovations in technology, we will continue to strengthen and expand the repertoire of pedagogies used by faculty to develop current century skills in our students.

## 2014 EMERGING PRIORITIES

Expand use of interdisciplinary, inquiry-based, project-based, and student-centered pedagogies across all grade levels.

Examine and strengthen differentiation and student learning support school-wide, including support for students with learning differences.

Research and integrate new pedagogies and technologies that help achieve the school's programmatic vision.

## 2018 UPDATES

**Accomplished.** All faculty have completed "PBL 101," the foundational project-based learning course from the Buck Institute as well as work on inclusive, interdisciplinary pedagogy with Facing History and Ourselves. Faculty meetings, division meetings, grade-level meetings, and ad-hoc collaborations have yielded significant advancement in this area, and support from a science curriculum consultant and the new Learning Commons staff has been especially helpful. Advancements in student learning reflective of these elements can be seen in numerous examples throughout the school.

**Accomplished.** A Differentiation and Learning Support Committee met several times throughout the 2015-16 school year to assess school practices and identify areas for school-wide professional development targeting differentiated instruction. In January 2017, the school spent two full days working with Deb Burns from Association for Supervision and Curriculum Development (ASCD) focusing on differentiation techniques and strategies. The school has also continued to evolve in the area of learning support. Communication between learning specialists, classroom teachers, and parents/guardians has been greatly improved. A pilot program to address the needs of students with specific language based learning differences was also piloted in the 2017-18 school year.

**Accomplished/Ongoing.** For the past four years, school-wide professional growth opportunities have been designed to equip the faculty with the pedagogical tools necessary to achieve the goals outlined in the strategic plan. The week-long INSPIRE summer institutes for teachers in 2015 and 2016 focused on project-based and hands-on learning. A panel of educators from Mark Day School's local and global partners in October 2015 focused on advancing how we think about cross-cultural literacy. Workshops with VISIONS, Inc. (2015 and 2016), Blink Consulting (2017), and Gender Spectrum (2018) have helped us focus on diversity and inclusivity issues. At the same time, technology tools have also been integrated in service of the school's programmatic vision, including G Suite apps, Google Classroom, vector drawing tools, 3D modeling software, a vinyl cutter, a laser cutter, arduino microcontrollers, and other programmable objects such as Blue Bots, Spheros, and Cubelets.

# STUDENT ASSESSMENT

To better measure mission-based, whole-student growth, we will continue to develop meaningful and consistent student assessment tools and practices to make more effective use of quantitative and qualitative data.

## 2014 EMERGING PRIORITIES

**Highlight the cognitive and noncognitive skills and competencies that are essential to assess.**

**Develop assessment tools and practices for measuring student learning outcomes that:**

- **Use feedback from student reflection and graduate outcomes.**
- **Are implemented consistently across all grades.**
- **Guide the school in gauging our success in achieving our vision of a current century educational program.**

## 2018 UPDATES

**Accomplished.** During the 2015-16 and 2016-17 school years, the faculty and administration defined a set of seven foundational literacies, four cross-disciplinary literacies, and seven metacognitive skills that are essential to teach at all grade levels. Drawing on backwards design and a blueprint for change over time, the faculty developed long-term transfer goals for each of these 18 core competencies, with specific indicators for the metacognitive skills. This work laid the foundation for the rest of the schoolwide work on student assessment that was to follow.

**In process.** Since 2015, the faculty and administration have engaged in in-depth, schoolwide, multi-year work on assessment. Report cards were revised schoolwide to incorporate our evolving assessment goals and align language K-8. Professional development is currently focused on developing assessment literacy in the faculty and administration through incorporating wider use of formative assessment practices, rubrics, and mastery-based learning. Student self-reflection and goal setting are increasingly used as part of the learning process, and students now lead their own conferences in grades seven and eight.

# STRUCTURES & SUPPORT

We will continue to align professional development strategies, the faculty evaluation process, and the size and structure of the administration with the school's current and future programmatic vision.

## 2014 EMERGING PRIORITIES

Ensure that each cross-curricular literacy strand has administrative and/or faculty leadership that enables advancement in student learning.

Devise timelines and clear priorities and provide appropriate support to manage the pace of change while furthering the implementation of the school's programmatic vision.

Plan professional development for faculty that is targeted at helping them assess, differentiate, and remediate student learning more effectively.

Revise the faculty evaluation system to align with programmatic vision.

Establish an innovation fund to nurture the spark of new programs and systems approaches.

## 2018 UPDATES

**Accomplished.** Each literacy (cross-cultural literacy, eco-literacy, media and information literacy, and social and emotional literacy) has a combination of administrative team and faculty leadership collaborating to advance these areas and integrate them across the program.

**Accomplished.** Every year - and often over multiple years for more significant efforts - we establish major arcs for curricular review and advancement, strategic initiatives, and faculty/staff initiatives.

**Accomplished/Ongoing.** In addition to the very targeted workshops led by outside speakers that have been offered to faculty in recent years, such as visits from Bridges Math expert Pia Hansen in 2014, 2015, and 2016, a day-long focus on executive function with renowned expert Sarah Ward in 2016, and a day-long focus on differentiation with Deb Burns in 2017, the faculty has worked collaboratively in an overhauled weekly faculty meeting schedule on these topics. In addition, the faculty has worked in committees during the 2015-16 and 2017-18 school years to advance work in key areas, including differentiation and learning support, diversity and inclusivity, preparing for new learning spaces, and assessment.

**In process.** A Faculty Evaluation and Professional Growth Exploratory Committee was launched during the 2017-18 school year. In its first year, the committee reflected on what aspects of the current system worked well and what could be improved. Models used by other schools were explored and a set of guiding principles were established. In the coming year, the committee will design a draft system with input from the full

**Carries forward as a 2018 Emerging Priority.**

# 2017-18 UPDATED EMERGING PRIORITIES FOR TEACHING & LEARNING FOR THE CURRENT CENTURY

Refine assessment tools and practices for measuring student outcomes that align with Foundational and Cross-Disciplinary Literacies, Metacognitive Skills, and best practices; use that feedback in communication with students and families. (Revised from 2014)

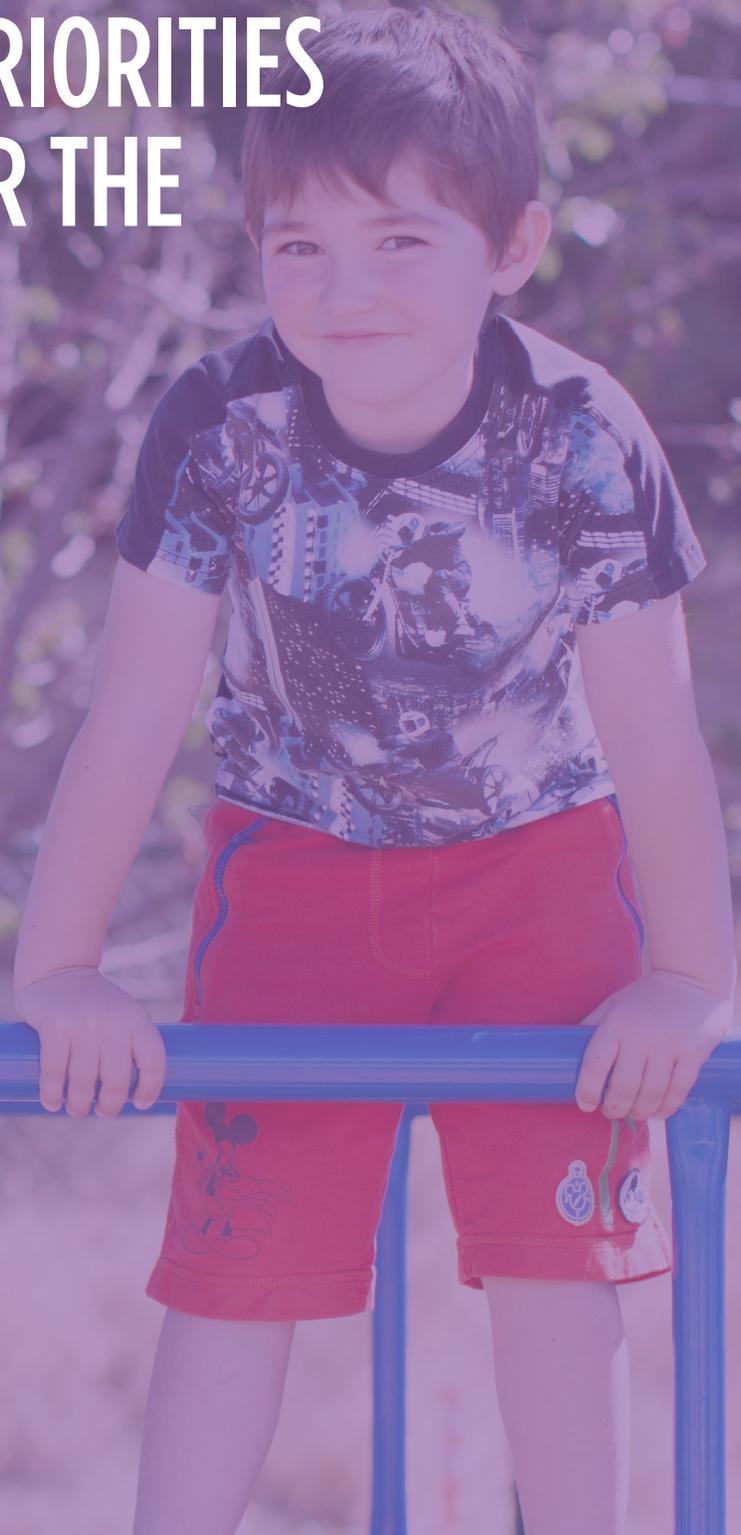
Refine communication of teaching and learning initiatives for all constituencies. (Revised from 2014)

Revise the faculty evaluation system to align with programmatic vision.\*

Establish an innovation fund to nurture the spark of new programs and systems approaches.\*

Refine and implement scope and sequence for Foundational and Cross-Disciplinary Literacies.\*

\*CARRIED OVER FROM 2014 EMERGING PRIORITIES



# RETHINKING TIME & SPACE

A child's school experiences are shaped by place - the physical environment where a teacher engages a student and where a child learns - and by time - a daily schedule and school calendar that provide opportunity for innovation, collaboration, quiet reflection, and social interaction. The thoughtful and inspiring design of a school's physical and virtual environments coupled with the intentional use of time that supports the effective use of those environments transforms teaching and learning. With this philosophy as our inspiration, we have developed the Campus Master Plan, which embodies our vision for advancing the campus to support great teaching and learning even more strongly. As stated in the Master Plan, our campus should "reflect and reinforce the school's mission and values; it should...reveal on the outside who we are and what we value on the inside."

# SUPPORT GREAT TEACHING & LEARNING

We seek to create environments that reflect our belief that the learner is at the center of effective education, that new knowledge is constructed through creation and social interaction, and that mistakes are at the root of innovation. We will continue to design spaces, schedules, and calendars that support great teaching and learning.



## 2014 EMERGING PRIORITIES

Successfully complete Phase I of our Master Plan, the Learning Commons and Creativity Lab, and prepare for the next phase of renovation to complete the campus transformation.

Integrate ecological literacy and environmental sustainability throughout the implementation of the Master Plan.

Review and evaluate schedule and explore alternatives that create time for greater collaboration within and across grades, divisions, and departments.

Review and evaluate calendar year for alternatives that may better support our vision for teaching and learning.

Provide professional development to faculty on using newly developed spaces and tools to advance current century skills.

## 2018 UPDATES

**Accomplished.** The Learning Commons and Creativity Lab were unveiled on March 22, 2018, and are being utilized by all students. We are currently evaluating needs to address Phase II of facilities renewal/renovation and the need for additional endowment to support long-term excellence and accessibility.

**Accomplished.** The Learning Commons and Creativity Lab project was designed and built to achieve LEED Platinum status, including energy use, landscaping, and more. Mark Day solar array was installed during fall 2017. Also, additional bus stops were added in 2017-18 to reduce our carbon footprint. High efficiency LED lighting added to classrooms across the campus and high efficiency furnaces replaced remaining legacy furnaces in classrooms. In spring 2018, Mark Day transitioned to “deep green” energy mix from Marin Clean Energy.

**Significant Progress.** Faculty meeting and professional development days have been redesigned to sustain focus on major teaching and learning initiatives and to increase collaboration time within and across grades.

**Carries forward as 2018 Emerging Priority.**

**Accomplished.** Professional development for every faculty member from 2013-18 focused on using new learning spaces to heighten academic excellence in traditional disciplines AND to foster current century skills such as critical thinking, curiosity, creativity, collaboration, and a growth mindset.

# COMMUNITY

Building and maintaining strong connections with our school, local, and global communities are essential to our mission. We will continue to explore how our calendar, daily schedule, and use of our campus and Bay Area surroundings can help us to deepen these connections.

## 2014 EMERGING PRIORITIES

Design physical spaces and virtual environments that connect students, teachers, and parents to one another, to local and global partners, and to other members of our extended community.

Develop spaces that welcome the local and school community.

Evaluate how our use of time can create a more inclusive environment.

Ensure long-term site permanence.

## 2018 UPDATES

**Accomplished.** In March 2018, we completed construction on our new Learning Commons, Creativity Lab, amphitheater, and quad. These new learning spaces allow all members of our community to come together during assembly, recess, events, and cross-grade activities.

**Accomplished.** When current and prospective families arrive through our new breezeway, they enter the heart of our campus. This community-driven space is a wonderful space to welcome everyone to Mark Day.

**Accomplished/Ongoing.** We have and will continue to implement parent/guardian training, Board training, faculty/staff/admin training, modifications to faculty meeting schedule, timing of parent education and orientation events (now largely two sessions offered for each), and shaping of the school calendar to honor Jewish high holidays.

**Ongoing.** The school's five-year renewal from 2018 has been initiated for extension to 2023. Our lease term remains through 2045.

# 2017-18 UPDATED EMERGING PRIORITIES FOR RETHINKING TIME & SPACE

Launch the new Learning Commons, Creativity Lab, Amphitheater, and Quad. Look for opportunities to take advantage of these new learning spaces with current students and families, alumni/ae and alum families, prospective students and families, the local community, and local and global partners.

Continue to investigate emerging trends, tech disruptions, and best practices to inform new program elements and use of spaces.

Review and evaluate schedule and explore alternatives that create time for greater collaboration within and across grades, divisions, and departments.\*

Review and evaluate calendar year for alternatives that may better support our vision for teaching and learning.\*

Successfully complete Phase I of our Master Plan, the Learning Commons and Creativity Lab, and prepare for the next phase of renovation to complete the campus transformation.\*

Ensure long-term site permanence.\*

\*CARRIED OVER FROM 2014 EMERGING PRIORITIES



# OUR COMMUNITY

Community forms the heart of who we are as a school. From the days of our founding in 1980, our students, families, faculty, and staff have shaped the history and culture and identity of Mark Day School. We cherish the connections with our multiple communities and are committed to making those connections even more vibrant. We look forward to the many ways in which our current and alumni students and families continue to influence Mark Day School - just as we count on our future students, families, faculty, and staff to continue shaping our school and community.

# INCLUSIVITY

We will continue to nurture and support a culture of inclusivity. We will continue to broaden and strengthen our culture of inclusiveness and support our commitment to equity and social justice. As we do so, we will ask, “What assumptions are we making? Who is not at the table? Who feels empowered, and who does not?”



## 2014 EMERGING PRIORITIES

**Refine communications strategies for our internal and external community.**

**Support all students and families and provide opportunities for full engagement in the life of the school.**

**Undertake intentional professional development of administration, faculty and staff, and families to increase cross-cultural competency and inclusion.**

## 2018 UPDATES

**Accomplished/Ongoing.** This year, the Hip Pocket News was reimaged to communicate to parents important information about our community in a succinct and engaging way. Our strategy for marketing and advertising is continually being refined to optimize our outreach to mission-fit families across the Bay Area.

**Accomplished/Ongoing.** To ensure that all students and families are engaged in our community, we implemented Indexed Tuition and diversity and inclusivity training for all faculty and staff.

**Accomplished/Ongoing.** Since 2014, we have consulted with VISIONS, implementing and increasing professional development for faculty, staff, and trustees on diversity. We provide VISIONS training for all new faculty, staff, and trustees in addition to yearly (or every semester) trainings for all faculty, staff, and trustees. We also began work with other organizations including Gender Spectrum and Blink. Recent topics have included gender spectrum, color blindness, dangers of a single story, and how young children learn race. Additionally, we created a Diversity and Inclusivity Committee comprised of faculty and staff. Their work included exploring affinity groups, a curriculum audit, and differentiated professional development opportunities including a Summer Equity Challenge. Furthermore, we implemented annual parent/guardian trainings like Thinking About Summer Reading Through A Multicultural Lens (spring 2017) and Dimensions of Gender (spring 2018).

# OUTREACH

We will continue to deepen our connection to both our current families and to alumni, faculty, neighbors, local and global partners, prospective families, and the greater Marin County by devoting existing and additional resources to support the work necessary to build and strengthen our community.

## 2014 EMERGING PRIORITIES

Increase diversity in its many dimensions through strategic outreach to students, families, faculty, staff, and trustees with the goal of reflecting the evolving diversity of Marin County.

Introduce an internship program to attract and develop faculty from diverse backgrounds and experience.

Expand connections with local and global partners.

## 2018 UPDATES

**Accomplished/Ongoing.** We officially changed our name from Saint Mark's School to Mark Day School on July 1, 2014. Additionally, moving to an Indexed Tuition model from a financial aid model has enabled us to create and sustain a more inclusive community. We also include a financial inclusivity statement on every communication and announcement to ensure coverage of extracurricular activities for those students paying tuition below the top of the index. Furthermore, we reviewed our hiring process in-depth and expanded our hiring practice to assess candidates' cultural competency and continue to post job openings on various diversity-focused agencies like POCIS and Strategenius. We continue to review student admission processes and practices, materials, and marketing to make sure diversity in various dimensions is represented.

**Accomplished.** The intern program launched in the 2016-17 school year. This program was created to increase diversity by bringing new educators into the community and providing them with opportunities to develop their practice through a thoughtfully designed two-year experience. Interns are selected from teacher training programs and share their ideas and the latest research on best practices in education. Upon completion of the program, interns will either be supported in their pursuit of outside jobs, or apply for openings at Mark Day School.

**Significant progress.** At the time that the 2014 Strategic Plan was approved, the very first student delegations had only just returned from our partner schools in both Costa Rica and Beijing. Since then, we have sent student delegations to Costa Rica and Beijing every year, deepening our connections with each visit. We have also hosted students and faculty from Costa Rica every fall since 2014. Student delegations visited Mark Day School from Beijing in winter 2016 and 2017 and teacher delegations visited in summer 2015 and 2017. Our kindergarteners started a pen pal exchange with students in Beijing in 2017. In addition, our connection with Kliptown Youth Program (KYP) has deepened through artist-in-residence visits to Mark Day School in 2013, 2015, and 2018, funded largely by fund-a-need donations, with special extended visits from KYP co-founder Thando Bezana in 2016, 2017, and 2018. Work with our local partners has continued; we partner with Adopt-A-Family, Ritter Center, local assisted living facilities, Glide, Downtown Streets Team, and local schools.

# CONNECTIONS

We will continue to strive to be widely recognized as a leader in current century education and highly regarded as a strong, diverse, and inclusive community that supports and connects each of its constituents, both within the school and within the broader community.

## 2014 EMERGING PRIORITIES

Build recognition of the Mark Day School name and reaffirm our commitment to our longstanding identity and values. Use our new name as an opportunity to expand the school's brand and identity to the broader community.

Become a resource in the community for current century teaching and learning.

Employ and consider expanding afterschool and summer programs to better serve current families and expand connections with the broader community.

Expand connections with local and global partners.

## 2018 UPDATES

**Significant progress.** Our marketing and advertising strategies are continually being refined to ensure that the Mark Day School brand and identity reaches the broader community. Our collateral reflects our longstanding identity and values, and promotes the school according to our mission and teaching philosophies.

**Significant progress.** In the past few years, we have hosted the INSPIRE summer institute, a World Language forum for professional development, and educators from our global partner schools and we collaborated with Facing History.

**Significant progress.** Our partnership with Tinkering School of SF launched summer 2017. We also increased aftercare in the summer program to provide realistic alternatives for working parents.

**Significant progress.** At the time that the 2014 Strategic Plan was approved, the very first student delegations had only just returned from our partner schools in both Costa Rica and Beijing. Since then, we have sent student delegations to Costa Rica and Beijing every year, deepening our connections with each visit. We have also hosted students and faculty from Costa Rica every fall since 2014. Student delegations visited Mark Day School from Beijing in winter 2016 and 2017 and teacher delegations visited in summer 2015 and 2017. Our kindergarteners started a pen pal exchange with students in Beijing in 2017. In addition, our connection with Kliptown Youth Program (KYP) has deepened through artist-in-residence visits to Mark Day School in 2013, 2015, and 2018, funded largely by fund-a-need donations, with special extended visits from KYP co-founder Thando Bezana in 2016, 2017, and 2018. Work with our local partners has continued; we partner with Adopt-A-Family, Ritter Center, local assisted living facilities, Glide, Downtown Streets Team, and local schools.

# EVALUATE PROGRESS

We will continue to use surveys, anecdotal feedback, and demographic information to better understand our community and ways in which we can be more inclusive and better engage with the broader community.

## 2014 EMERGING PRIORITIES

Implement a spectrum of tools to assess effectiveness of our program through the lens of diversity and inclusivity to be administered to all Mark Day School constituencies at regular intervals.

Integrate a rubric for cross-cultural skills and competencies into student assessment.

Develop a rubric for faculty and administrator evaluation to ensure incorporation of cross-cultural skills and competencies.

## 2018 UPDATES

**In process.** We work with a third party survey company to conduct a comprehensive survey of parents and guardians every 2-3 years; our most recent surveys were in spring 2016 and 2018. We also survey 8th graders as they prepare for graduation and also sophomores in high school.

**On deck.** Long Term Transfer Goals for cross-cultural skills and competencies have been established. In the upcoming 2018-19 school year, our Diversity & Inclusivity Committee will design a rubric.

**In process.** A Faculty Evaluation and Professional Growth Exploratory Committee will launch in the fall of 2018 to make recommendations for evaluation and growth program by the end of 2018-19 school year.

# 2017-18 UPDATED EMERGING PRIORITIES FOR OUR COMMUNITY

Assess co-programmatic needs/wants (e.g., after school programs, summer programs, lunch, bus), prioritizing and implementing high-impact options. Employ multiple lenses in these assessments, including diversity and inclusion.

Implement a spectrum of tools to assess effectiveness of our program through the lens of diversity and inclusion.\*

Study and implement student assessment tools for cross cultural literacy.\*

Continually study and spread inclusive practices (e.g., in hiring and retention, teaching and learning, etc.).

Evaluate the need for a branding exercise for Mark Day School.

Evaluate our new Indexed Tuition program per the Indexed Tuition implementation plan.



\*CARRIED OVER FROM 2014 EMERGING PRIORITIES

# BUILDING ON FINANCIAL EXCELLENCE TO SUPPORT THE PATH FORWARD

The financial strength of the school both reflects and supports our outstanding program, faculty, and community. This established strength will serve as the bedrock for implementation of our vision for both the program and our Campus Master Plan. We will continue to manage the inherent financial tension between upward pressure on tuition, our commitment to competitive faculty and staff compensation, and the value we place on our socioeconomically diverse culture. This plan empowers us to meet these challenges and to achieve our goals in a financially responsible and sustainable manner, all the while keeping Mark Day School on sure and steady financial ground.

# PHILANTHROPY

We will continue to strive to increase philanthropic support to achieve the innovative goals outlined in this Strategic Plan and the historic rehabilitation of its campus. These projects require fundraising to support programmatic growth, tuition assistance, and the campus Master Plan.

## 2014 EMERGING PRIORITIES

Develop comprehensive stewardship program:

- Strive to grow The Mark Day Fund to 10% of the operating revenue.
- Grow the school's unrestricted endowment by \$1 million as part of upcoming capital and endowment campaigns.
- Strive to reach \$350,000 in disbursements to the school's operating budget in order to support school initiatives.
- Implement ongoing major gifts and planned giving programs.

Complete the capital campaign for the first phase of the Master Plan.

Complete the planning phase and strive to launch the capital campaign for the second phase of the Master Plan within the next five years.

Showcase school programs in seeking outside sources of philanthropic support.

## 2018 UPDATES

**In process.**

- A task force is evaluating a revised goal for what percentage of the operating budget The Mark Day Fund should comprise.
- Endowment increased by nearly \$250,000 in new gifts between 2014 and 2018.
- Ongoing, endowment spend rates are evaluated annually during each budgeting cycle. This year we met with our investment manager to understand the comparison to market.
- Now that the *We Create* campaign is complete, we will work to implement ongoing major gifts and planning giving programs in the 2018-19 school year.

**Accomplished.** The capital campaign was completed in March 2018, exceeding our fundraising goal by raising more than \$6.55 million from 244 families.

**In process.** The board is engaging in campaign needs assessment beginning in the 2018-2019 school year.

**In process.** In early 2018, we launched a task force to study and propose to the Board three alternative revenue sources by the end of the school year.

# BALANCE FINANCIAL TENSIONS

With the mission as our guide, we will continue to strive to manage tuition increases, create a vibrant and enhanced program, achieve and maintain competitive compensation for faculty and staff, and provide support for tuition assistance. We will continuously address the tension that exists among these forces.

## 2014 EMERGING PRIORITIES

Strive to keep tuition financially competitive with our peer schools.

Educate families to expect annual tuition increases in order to fund the outstanding program offered, compensate faculty and staff fairly, and maintain a socioeconomically diverse community (from 2009 SP).

Research and consider adopting an Indexed Tuition program to strive for a more inclusive community across the socioeconomic spectrum.

Maintain a target of approximately 15.5% of gross tuition and fees supporting tuition assistance, including support beyond tuition and fees for students.

Regularly assess faculty and staff compensation and benefits to ensure that we are competitive with peer schools, including the establishment and maintenance of above-median salaries by experience band.

Maintain thoughtful evaluation and approval process for material investments in the program.

## 2018 UPDATES

**Ongoing.** The budget is built based on the cost of educating a child at Mark Day School; included in our benchmarking is monitoring peer schools' tuition. As of 2017-18, the school's tuition is approximately at the median of peer schools.

**Ongoing.** The Board strives each year to minimize tuition increases and to share information proactively about the connection between tuition, the outstanding program that it funds, compensation for faculty and staff, and accessibility and socioeconomic diversity. This is a major focus for the administrative team and Board of Trustees both in the short- and long-term.

**Accomplished.** After assembling an Indexed Tuition Task Force that evaluated and planned for a new program, Indexed Tuition was implemented in the 2017-18 school year.

**Accomplished/Ongoing.** We are on target to achieve 15.5% of gross tuition and fees dedicated to Indexed Tuition and continue to use that benchmark.

**Accomplished/Ongoing.** Assessments are performed and integrated as part of our annual peer compensation review process. Salaries are reviewed carefully with a balance between budget and goal of at-or-above median salaries.

**Accomplished/Ongoing.** All material investments in our school's program are reviewed, evaluated and approved by the administrative team (and Board of Trustees for long term strategic outlooks).

# GROWTH

We will continue to manage the balance sheet strategically to achieve our vision for program, facilities, and community as part of maintaining long-term financial sustainability.

## 2014 EMERGING PRIORITIES

Carefully integrate and appropriately manage long-term debt to support the Master Plan with consideration of its operating budget impact (under both upside and downside scenarios).

Manage endowment investment and spending to fund a larger portion of the operating budget and provide long-term benefit to the school.

Grow and monitor appropriate operating reserves to fund initiatives and manage risk in the present and in the future.

## 2018 UPDATES

**Accomplished/Ongoing.** We continue to manage and monitor our debt service and possibilities to reduce our debt balance through available capital funds. We review our debt service ratio and liquidity coverage at the end of the fiscal year per our audited financials with First Republic Bank.

**Accomplished/Ongoing.** In 2017-18, our annual investment review included both performance and benchmark metrics for our return and endowment spend. Our investment manager will continue to provide formal review annually.

**Ongoing.** We continuously manage and monitor our operating reserves. In 2017-18, we met with our investment manager to discuss various investment vehicles that we may leverage to grow our operating reserve in the market, in compliance with our investment policy.



# 2017-18 UPDATED EMERGING PRIORITIES FOR FINANCIAL EXCELLENCE

Create and launch task force to study and propose to the Board three alternative revenue sources by end of 2017-18 school year.

Establish Campaign Planning Committee to prioritize and launch efforts to increase endowment, major gifts, and planned giving initiatives.

Revisit and, as necessary, reset True Blue Annual Fund target (% of operating budget) relative to budget.

Build on celebration of *We Create* capital campaign success to highlight why people give and the impact philanthropy has on the culture and mission we cherish.

Undertake appropriate demographic study to understand the school's market and family/prospective family goals.

Clearly communicate with families the school's finances, stability, and strategic planning (strategic plan, campaign, and community).

\*CARRIED OVER FROM 2014 EMERGING PRIORITIES

