



PALM BEACH DAY ACADEMY

THE PATH FORWARD

A STRATEGIC PLAN TO BEGIN THE NEXT CENTURY AT PBDA
2021 - 2026





OUR MISSION

The foundation of Palm Beach Day Academy's program is the education of our students in an academically challenging and compassion-rich environment that guides each child toward personal excellence of mind, body and character. At all levels, our students will be:

*Challenged to Excel
Empowered to Act
Prepared to Lead*

NON-DISCRIMINATION POLICY

Palm Beach Day Academy admits students of any race, color, national and ethnic origin to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admission policies, scholarship and loan programs and athletic and other school-administered programs.

Dear alumni, parents and friends,

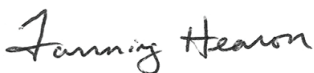
On behalf of the faculty, staff and Board of Trustees, we are excited to share with you our most recent Strategic Plan for 2021-2026. Two years in the making and delayed by the pandemic, the plan includes our institutional goals for the next five years. Despite the difficulties of the past year, PBDA has already achieved success in several critical areas of strategic engagement: admissions, fundraising, and programming. Without a doubt, it is an exciting time to be a part of our academic community and, most importantly, to be a student at our special school.

PBDA remains the school of choice for families in Palm Beach County for a reason: we have the most talented and dedicated faculty and staff in the southeast, we have a dynamic program that focuses on academic and personal growth, and we are located in one of the most beautiful places to live in the United States. We hope that many aspects of this plan will resonate with you as we attempt to manage growth, promote financial sustainability, and provide our students with the best education possible.

Thank you to everyone who participated in this important planning process. We are greatly appreciative of your support of the school and for taking the time to share with us your thoughts on the PBDA experience and how it can be improved. We look forward to continuously using your feedback to further establish our reputation as the preeminent independent school for students in the state of Florida. The strategic plan is a working document and will be updated over time to reflect the needs and desires of our community. We appreciate your continued partnership as we enter the second century of PBDA's proud history in Palm Beach.

Please feel free to reach out to us at any time with your thoughts on this important moment in our school's future.

Sincerely,



Fanning Hearon
Head of School



Grant Mashek
President
Board of Trustees



Ben Alexander
Chair
Strategic Planning Task Force



STRATEGIC PRIORITIES AND INITIATIVES

PROGRAM

Palm Beach Day Academy will be nationally recognized as an independent school leader that develops knowledgeable and confident critical thinkers who are prepared to succeed in secondary school, college, and the complex, ever-changing world that they will inherit. To achieve this goal, PBDA intends to:

- Promote a **collaborative learning and teaching environment** that supports and encourages excellence, the use of innovative pedagogies, interdisciplinary learning, and the effective use of technology.
- Meet the needs of each student by implementing methods of **differentiated instruction** that support student growth.
- Explore ways to create a **stronger sense of community** at all grade levels, one that fosters a school culture in which students not only grow academically, but also develop the essential traits of character and integrity.
- Remain committed to strengthening the **collaborative relationship** between the Lower and Upper Campus faculties and students.
- Maintain our commitment to **external engagement** with our town, county, state, national and global communities.
- Promote greater **inclusivity and diversity** amongst our student and faculty populations.



FACULTY AND STAFF

Palm Beach Day Academy will become a professional destination of the highest academic level that attracts, retains and develops the most talented faculty and staff. To achieve this goal, PBDA intends to:

- Offer a salary and a **compensation** package that is responsive to faculty and staff needs and is highly competitive among our peer institutions.
- Strengthen **cross-campus communication and collaboration** in order to both enhance curricular cohesion as well as collegiality between the two campuses.
- Promote the importance of **professional growth** - including professional development, evaluation and self-assessment - as an essential element of faculty and staff culture.
- Provide training and encourage faculty to be **exemplary role models of respect and inclusivity** for our student body.





STRATEGIC PRIORITIES AND INITIATIVES

ENROLLMENT MANAGEMENT

Palm Beach Day Academy will attract and retain the strongest mission-appropriate students and families from across Palm Beach County and beyond. To achieve this goal, PBDA intends to:

- Strengthen the admissions and retention process to maximize student enrollment and help PBDA achieve and **maintain optimal school size**.
- Enhance the **relationship between the Admission Office and the Student Success Team (SST)** when making recommendations regarding the continued enrollment of individual students based on the school's mission and best educational practices.
- Examine our approach to the Financial Assistance program with the intent to **increase access to PBDA for diverse and underrepresented communities** in Palm Beach County.
- Strengthen our marketing efforts to **communicate PBDA's value proposition** and encourage more prospective families of different socio-economic backgrounds to apply.



CAMPUS AND FACILITY

Palm Beach Day Academy will establish plans for immediate and long-term improvements to the Lower and Upper Campus facilities. To achieve this goal, PBDA intends to:

- Address the alignment between current facilities and recent enrollment growth in deciding which **campus projects** will be completed in a realistic timeline.
- Create a Master Plan for both the Lower and Upper Campuses which focuses on the **best long-term use of our existing facilities**.
- Plan for the **financing of campus renovations** including new and renovated classroom spaces, kitchen and cafeteria improvements, and upgrades in technology on both campuses.
- Identify and propose **sustainability opportunities** that support our current status as a Green School of Excellence while also focusing on enhancing the beauty of our two campuses.





STRATEGIC PRIORITIES AND INITIATIVES

PHILANTHROPY

Palm Beach Day Academy will build and strengthen a culture of philanthropy through a strategic development operation that results in increased, consistent philanthropic contributions that support a sound financial plan for the school's second century. To achieve this goal, PBDA intends to:

- Build a **comprehensive development operation** that is systematic and sustained through the implementation of annual, major, and planned-gift development strategies.
- Grow an **Annual Fund** that helps to raise PBDA's visibility; cultivates and secures annual, unrestricted support; and promotes a strong culture of philanthropy among parents, grandparents and alumni.
- Initiate a **"Campaign for the Second Century"** that celebrates PBDA's Centennial through major gift fundraising, fuels the top strategic priorities of the school, increases unrestricted annual support, and builds an endowment for the long-term sustainability of the institution.
- Establish appropriate metrics for the school's **philanthropic goals** in order to track progress and compare PBDA with peer institutions.



FINANCIAL SUSTAINABILITY

Palm Beach Day Academy will ensure the long-term financial sustainability of the institution so that the administration can continue to adapt to changing circumstances while supporting the mission of the school. To achieve this goal, PBDA intends to:

- Create a **sustainable financial model** that allows for fluctuations in enrollment.
- Achieve a **long-term debt solution** by refinancing the school's current debt obligations.
- Plan for the **future financing of campus renovations** by establishing an account which will provide for the annual replacement of aging facilities and special maintenance needs.





TASK FORCE AND TRUSTEES

STRATEGIC PLANNING TASK FORCE

Chair

Ben Alexander

Program

Co-chairs

Martha Bjorklund
Fanning Hearon
Sarah Kemeness

Gita Costa
Mona Fakhoury
Heather Fanberg
Juliana Gendelman
Jim Gramentine
Jen Howard

Faculty and Staff

Co-chairs

Ben Alexander
Stephanie Carden

Kimberley Belfi
Courtney Ellender
Fanning Hearon
Kevin Lamb
Erin Sayer
Scott Thompson

Enrollment Management

Chair

Juliana Gendelman

Dorothea Cvelbar
Stephanie Filauro
Brent Gallagher
Brandie Herbst
Christina Macfarland '98
Maura Ziska

Campus and Facility

Chair

Caroline Forrest '92

Billy Coyle
Chris Evans
Chad Gruber

Philanthropy

Chair

Todd Savage

Adrienne Arp '92
Fanning Hearon
Andrea Kosoy
Chris Orthwein
Caroline Rafferty
Richard Tummon

Financial Sustainability

Chair

Christopher Vecellio

Billy Coyle
Matt Lorentzen
Tim Mullen

ADMINISTRATION 2020-2021

Mr. Fanning M. Hearon III, *Head of School*
Mrs. Martha Bjorklund, *Head of Lower Campus*
Mr. Samuel Bourgeois, *Director of Technology*
Mr. William Coyle, *Director of Finance and Operations*
Mrs. Stephanie Filauro, *Director of Admission*
Mrs. Brent Gallagher, *Director of Marketing & Communications*
Ms. Sarah Kemeness, *Head of Upper Campus*
Mrs. Meghan Monteiro, *Director of Philanthropy*

BOARD OF TRUSTEES 2020-2021

Mr. Grant Mashek '95, *President*
Mr. Ben Alexander, *Vice President*
Mr. Christopher Vecellio, *Treasurer*
Mrs. Juliana Gendelman, *Secretary*
Mrs. Gita Costa
Mrs. Caroline Forrest '92
Mr. David Gochman
Mrs. Andrea Kosoy
Mr. Matthew Lorentzen
Mr. Timothy Mullen
Mrs. Caroline Rafferty
Mr. Todd Savage
Mr. Charles Schumacher
Mrs. Maura Ziska
Life Trustee
Mr. William Matthews '67
Ex Officio
Mr. Fanning M. Hearon III, *Head of School*
Mrs. Christina Macfarland '98, *Pres. Parent School Council*





PALM BEACH DAY ACADEMY

Lower Campus: Age 2 - Grade 3 • 1901 South Flagler Dr., West Palm Beach, FL 33401

Upper Campus: Grades 4 - 9 • 241 Seaview Ave., Palm Beach, FL 33480

561.832.8815 • www.pbday.org