

# Strategic Plan

## 2015-2018

*During the 2014-2015 school year, the Ancona community participated in a process of dreaming about our future and voicing concerns for our beloved school. Information and ideas were collected in dozens of individual meetings with current and former parents and alumni, a town hall meeting for the entire community, focused surveys for parents, board and faculty members respectively, a faculty retreat, a board retreat, and several senior staff meetings. From this mountain of exciting ideas, several top areas of focus began to emerge. A Strategic Plan Task Force comprised of representatives of the parents, faculty, staff and board worked over the summer to prioritize and fully imagine the top ideas that we must pursue over the next three years to ensure Ancona's academic, cultural and financial strength. The plan below calls for establishing an ambitious shared vision for our future, analyzing our existing practices, and creating, launching and testing new programs to help realize our full potential over the next three years in the areas of our:*

**Education Program**

**Fiscal Strength**

**Tuition and Economic Diversity**

**Enrollment and Retention**

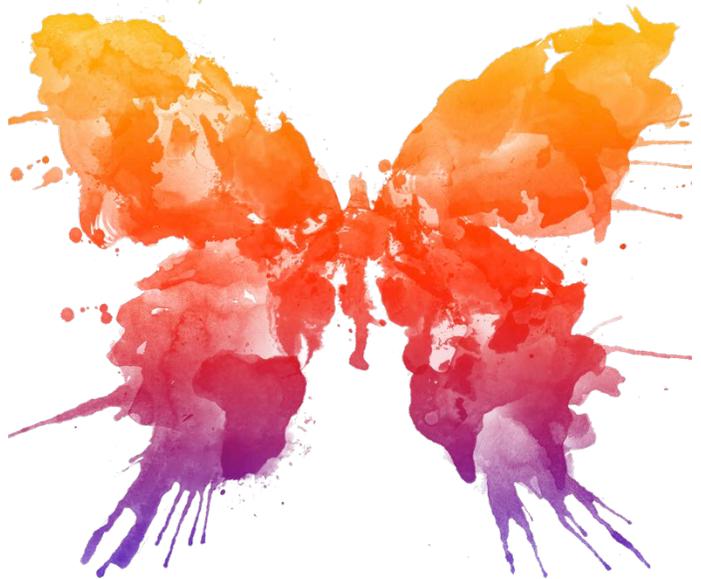
**Facilities**

**Communications**

**Community Building**

# Timeline

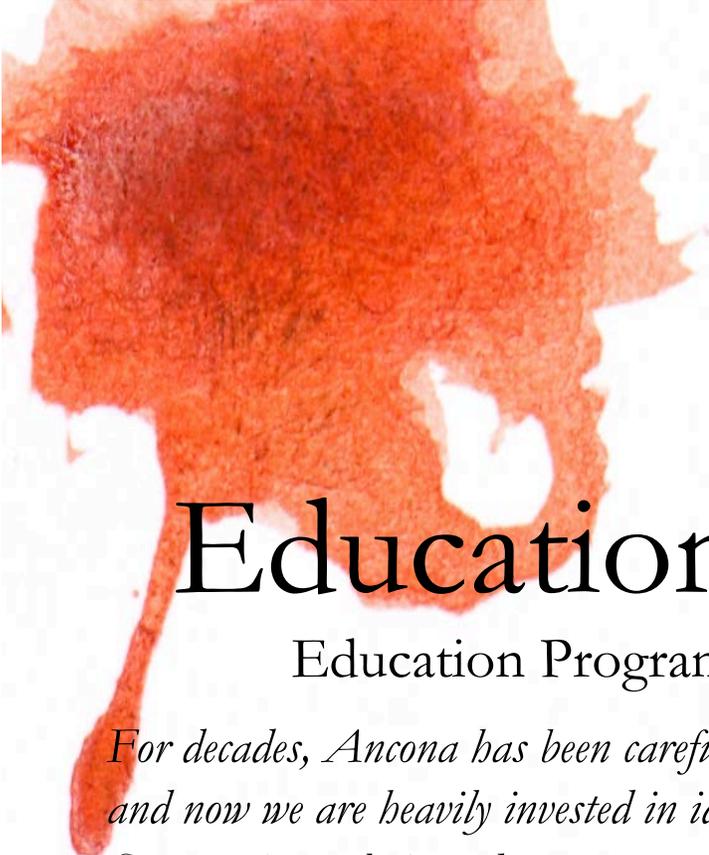
- Fall 2014
  - Conferences, discussions, interviews
- Spring 2015
  - Parent survey
  - Teacher survey
  - Town meeting
- Summer 2015
  - Board retreat
  - Strategic Plan Task Force (SPTF)
- Fall 2015
  - Town meeting, unveiling



# Who



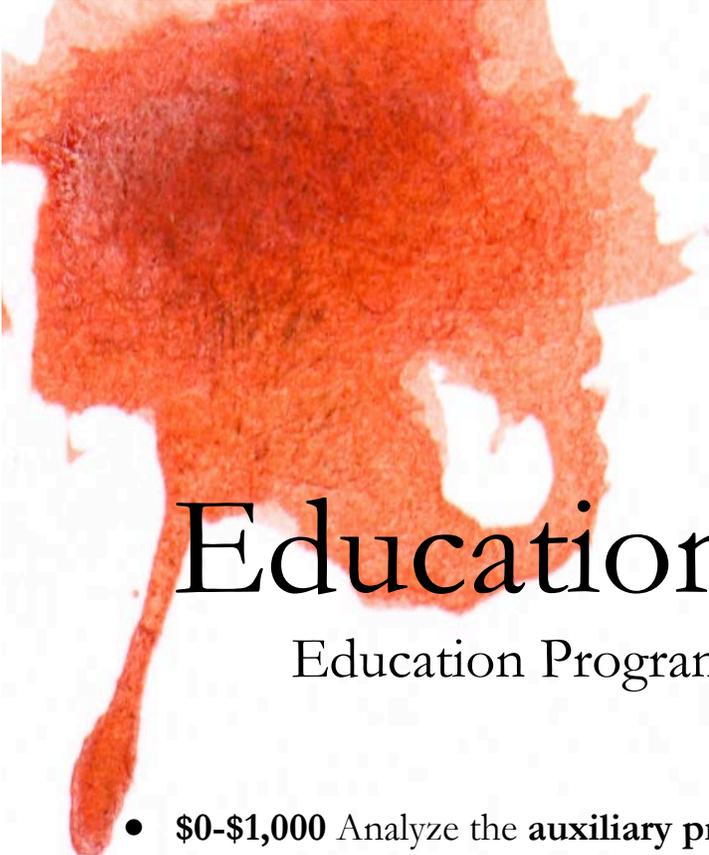
- Fall 2014
  - Conferences, discussions, interviews: **Dozens**
- Spring 2015
  - Parent survey: **84 parents**
  - Teacher survey: **26 teachers**
  - Town meeting: **≈30 community members**
- Summer 2015
  - Board retreat: **Whole board**
  - Strategic Plan Task Force (SPTF): **3 board; 3 parents; 2 teachers; 3 staff**
- Fall 2015
  - Town meeting, unveiling: **You**



# Education Program

Education Program Task Force (new)

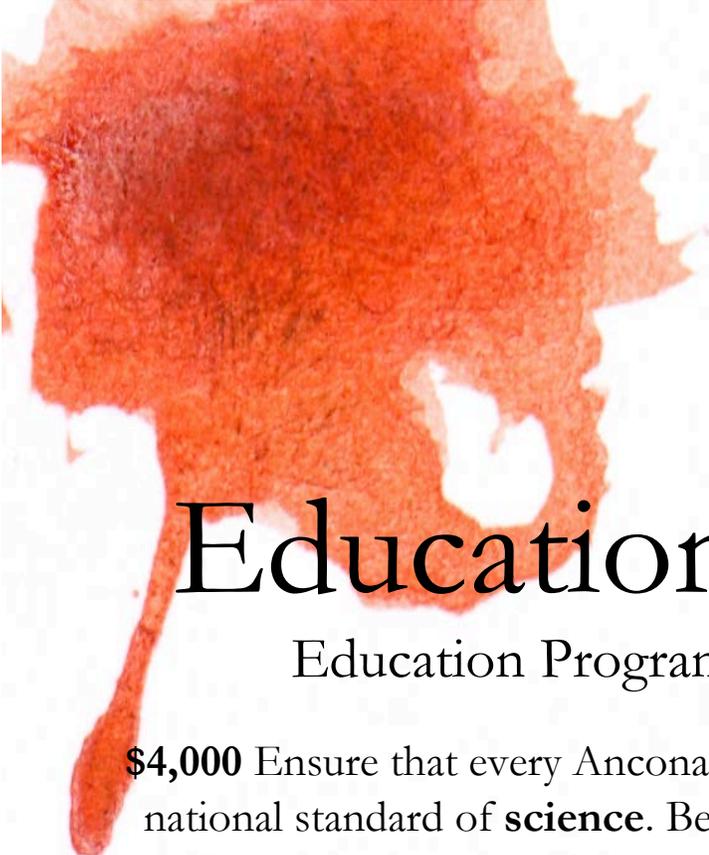
*For decades, Ancona has been carefully developing its unique program, and now we are heavily invested in identifying why it works so well. Systematic analysis and contemporary research will rejuvenate the program with fresh ideas and marketable results. We will also explore new areas of curriculum expansion and launch new programs in the next three years to ensure our students have the **optimum academic experience**. By the end of our 3-year cycle we will have multiple effective ways to explain what an Ancona education is, supported by strong claims and compelling evidence. Further, the school will expand its auxiliary programs to serve more families and community members with our approach. At the same time, Ancona will build relationships with community hubs to improve our program for students and for teacher development.*



# Education Program

## Education Program Task Force (new)

- **\$0-\$1,000** Analyze the **auxiliary programs**: determine how they are performing financially; compare them to our competitor's programs; survey parents and prospective families to identify their dreams for auxiliary programming (e.g., maker program; Spanish immersion; Social justice/service oriented); explore innovative new options for utilizing our faculty, staff and facility to maximize our reach and income
  - Beginning Spring 2016, the Ancona School will offer auxiliary programs that reflect the interests of Ancona parents and students
  - Consider ambitious new partnerships for after-school and summer programs and trips
- **\$0-\$3,000** Create new **institutional partnerships** to collaborate with Ancona in developing programs that support academic learning, social and emotional learning and/or social justice initiatives. Partnerships should mentor Ancona's program development, providing content experts in fields of study and creating access to specific training opportunities. (e.g., maximize relationships with MSI, Court Theatre, Du Sable Museum; increase opportunities for meaningful professional development through local colleges and universities, such as donated courses.)



# Education Program

## Education Program Task Force (new)

**\$4,000** Ensure that every Ancona graduate will meet or exceed a national standard of **science**. Beginning in the fall of 2015 and ending in the summer of 2016, identify the best practices in STEM/STEAM programs nationally; create a description of Ancona's ideal program; and develop a three year plan to get there and begin implementation in the 2016-2017 school year. Include assessment in the plan.

- **\$3,000** Beginning with the 2018-2019 school year, ensure that students have access to at least one teacher-written unit per year that integrates the arts into other subject areas. Create a plan for **arts integration** and fine arts programming.
- **\$0 STAFF: Identify Ancona's strategic competitive advantage**—what we do better than 95% of other schools—and share what we have learned with other schools across the country via white paper, website, teacher training, etc.

# Fiscal Strength

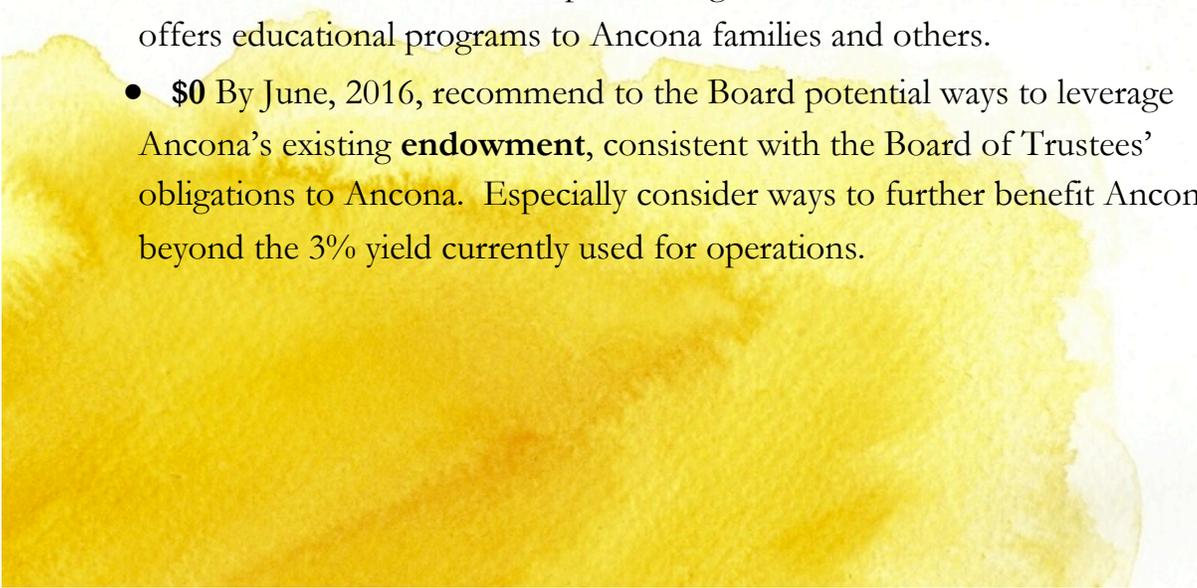
Finance Committee

Ancona's financial stability will improve as we take measured steps to align our investments with our goals. We will attain a level of fiscal health where we can easily **accommodate natural fluctuations in enrollment** while ever pursuing our **long range goals**. Whatever size the school is in any future year, we imagine a **robust, well-supported education program** appropriately sized, diverse in activities, and living its mission.



# Fiscal Strength

## Finance Committee

- **\$0** Establish **benchmarks** for fiscal health including the appropriate reserves and endowment levels, diversified income streams, etc. Set 1, 3, and 5-year goals to track our progress towards meeting these benchmarks.
  - **\$0** Develop a tool to estimate Ancona's cost and revenues 5 years at a time, building on Ancona's Medium-Term Planning Template. To model **financial sustainability** for Ancona, the tool will permit changing a variety of assumptions (e.g., enrollment level, tuition, financial aid).
    - **\$0** Develop a tool to estimate Ancona's cost and revenues 5 years at a time, building on Ancona's Medium-Term Planning Template. To model **financial sustainability** for Ancona, the tool will permit changing a variety of assumptions (e.g., enrollment level, tuition, financial aid).
  - **\$3,000** Beginning in the 2017-2018 school year, diversify our **revenue streams** to net \$50,000 annually particularly through significantly increasing income from underutilized assets, especially the auxiliary programs, classroom use in non-school hours, and positioning Ancona as a South Side institution that offers educational programs to Ancona families and others.
  - **\$0** By June, 2016, recommend to the Board potential ways to leverage Ancona's existing **endowment**, consistent with the Board of Trustees' obligations to Ancona. Especially consider ways to further benefit Ancona beyond the 3% yield currently used for operations.
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# Fiscal Strength

## Finance Committee

- **\$1,000** Raise \$50,000 by the end of 2018 to support increased teacher salaries through the **Bonnie L. Wishne Endowed Fund** for Faculty Support (Institutional Advancement Committee).
  - **\$0 STAFF:** Human Resources compliance.
  - **\$50,000-\$150,000 STAFF:** Invest in administrative tools, budgets, and staffing.
  - **\$0 STAFF:** Job assessments and Human Resources reviews of the current resources.
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# Tuition & Economic Diversity

Tuition & Economic Diversity Task Force (new)

We aim to make our standout progressive education available to families from many different backgrounds. In the next three years, we will evaluate our current **economic diversity**, establish goals for where we want to be, and make changes to address **affordability** and **financial aid** that honor both our commitment to supporting families who choose Ancona and maintaining a fiscally strong organization.



# Tuition & Economic Diversity

Tuition & Economic Diversity Task Force (new)

- **\$0** In order to enact our mission of serving an economically diverse body of students, by March 1, 2016, Ancona will have **metrics and systems** in place to monitor:

1. % of student population receiving financial aid
2. % of budget used for financial aid
3. Average financial aid award
4. All of the above metrics applied to disaggregated groups of priority students, both reflective of our mission and of operational priorities, such as those:
  - a. from low socio-economic strata backgrounds
  - b. from underrepresented cultures
  - c. who help Ancona fulfill its mission

In addition, Ancona will set in place goals to improve on its achievement, specifically:

1. Establish a specific goal for each of the metrics above
2. Show progress toward these goals with historical data as well as current data
3. Recommend recruitment goals in addition to financial aid goals.

# Tuition & Economic Diversity

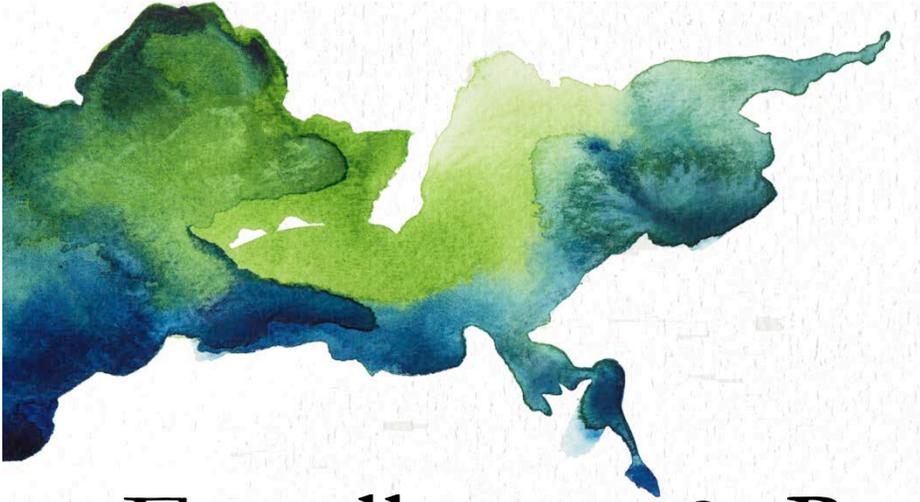
Tuition & Economic Diversity Task Force (new)

- **\$0** By July 1, 2017, recommend what Ancona can afford a **sibling discount decrease in tuition by 2.5% and 5%, or freezing tuition**. Recommendation should be tied to the mission's commitment to economic diversity, and support should come from alternative (i.e., non-tuition revenue streams).

1. Determine a list of peer schools, their offerings, tuition, and aid
2. Build models for tuition including:
  - a. Sibling discount
  - b. Decrease tuition by 2.5% and 5%
  - c. Freezing tuition

Explore alternative revenue streams to assist with financing these goals.

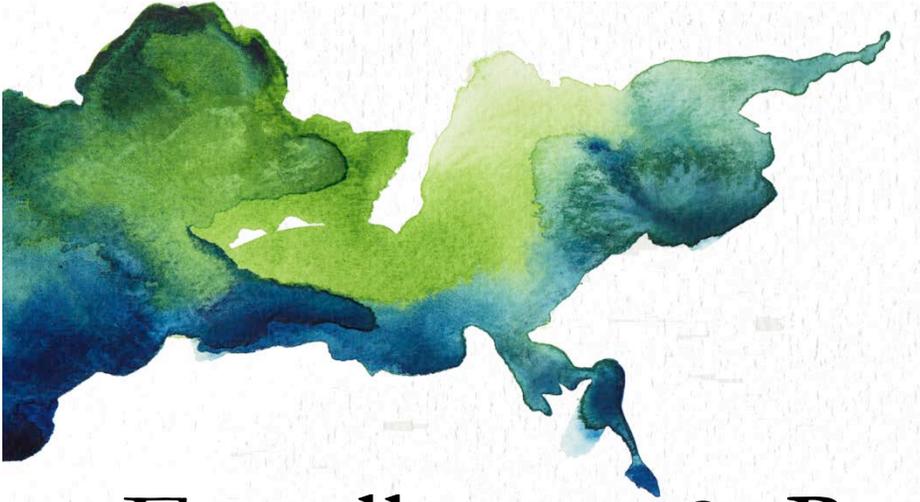




# Enrollment & Retention

Enrollment & Retention Task Force (new)

We will identify the **right number of students** we should educate annually to best fulfill our mission given limited resources. We will then create and implement enrollment and retention strategies to achieve that size.



# Enrollment & Retention

Enrollment & Retention Task Force (new)

- **\$0 STAFF:** Determine what will it take to get us to **full capacity** and create a plan to do so.
- **\$0 STAFF:** Establish our **ideal retention rate** and determine strategies to get us there.
- **\$0** Enroll 20 **new families** and **increase retention** by the 2017-2018 school year with an experiential dimension of admissions evidenced by multiple constituent groups reinforcing the brand and value proposition, especially at events and times when prospective parents are near.

# Facilities

## Facilities Committee

The school's physical campus must reflect the high quality of its activities. Parts of our campus are outdated. Parents, board members, teachers, staff, and students are very motivated at this time to **improve the space** for learning, and to **attract new families**. We will start by addressing relatively “quick wins” and finishing the projects we have begun. And we will make regular investments to make all student spaces **optimally designed for learning**. These efforts will improve science education, ecological education, arts education, and learning in all existing program areas. We anticipate a rise in enrollment because of our improvements in our physical spaces.



# Facilities

## Facilities Committee

- **\$0 STAFF: Small Projects Process** – create a small, nimble building committee comprised of a few key staff members charged with creating a list of building improvements needed and wanted, approve (or not) and provide guidance on improvement projects proposed by parents, and provide such feedback and support within three days of being approached by a parent; establish a small budget for such progress and work with advancement to secure funding from contributed funds where possible.
- **\$40,000** Immediately establish a small working group of trustees and staff to fast track improvements to the **Lobby and room 104** to achieve significant change for prospective parents and students' learning environment in the fall of school year 2015-2016.
- **\$500,000 OLS Phase 3** – Complete campaign and construction of phase 3 (i.e., dome, farm) for the Outdoor Learning Space by August 31, 2016, including raising the remaining funds, developing a program and plan for the Farm.



# Facilities

## Facilities Committee

- **\$0** The Facilities committee, or subcommittee thereof, shall maintain a list, updated at least twice a school year, which prioritizes the **top maintenance** or building improvement projects concerning the existing physical plant, and a long-range facilities plan. The list should include the approximate cost of each item on the list and a time frame for completing the suggested work. The list shall be compiled after receiving input from all school constituencies.
- **\$50,000** By July 1, 2017, integrate a permanent **science lab** in a dedicated space with all necessary equipment and storage, aligned with Ancona's science curriculum and new program recommendations. Include policies and protocols for maintenance, cleaning, replenishing supplies, and technical support.
- **\$0 STAFF:** Involve the new parent association in facility discussions (**Ancona Parent Connection**).
- **\$80,000/yr** Create a plan for **phased classroom improvements** in which over a period of 5-10 years all our classrooms are upgraded to be state of the art by our definition.



# Facilities

## Facilities Committee

- **STAFF: \$0 Cleanliness** – staff to ensure the building receives excellent daily and monthly deep cleaning; possibly explore a day in which volunteers chip in on small maintenance projects.
- **STAFF: \$1,000** Find creative and beautiful ways to **display student work.**
- **STAFF: \$0 Incorporate marketing goals** and perspective into our facilities planning in terms of aesthetics, celebrating student work, honoring our history and community.



# Communications

External Communications Department

*People at Ancona — students, parents, teachers, staff, trustees — want to have meaningful discussions with each other about key school issues. Ancona will support this chiefly by providing thoughtful analysis of the goals and effectiveness of our education program, where people have the most questions. By creating a common vocabulary about school achievement, we can engage in constructive conversations about how we are moving the school into the future.*



# Communications

## External Communications Department

- STAFF: **\$0** By the start of the 2016-17 school year, all current and prospective parents will have **access to clear information/data** from the previous five graduating classes showing: where students attend high school; achievement data (as shared or as public); college data; related qualitative data; other distinguished honors.
- STAFF: **\$0** To relieve parents' anxiety about Ancona student achievement and preparation, we will **survey parents** about their concerns, and research, publish and communicate relevant **student achievement data** at least annually.
- STAFF: **\$0** By the start of the 2017-18 school year, with continued ILT work, yield meaningful and quantifiable traits to illustrate **qualities of Ancona graduates** that can be used for both internal and external marketing.
- STAFF: **\$0 Communicate** information broadly about the future success of Ancona students in a fresh and effective way.



# Communications

## External Communications Department

- STAFF: **\$0** Establish an accurate qualitative and quantitative description of what our **students can do upon graduation** in a continuous improvement cycle per subject area.
- STAFF: **\$0** Use the **Landscape of Learning** to define what is happening in the classroom.
- STAFF: **\$0** Launch parent committee led by the Director of Teaching and Learning to **review communications plan** for the *Landscape of Learning*. Consider how this committee, the Ancona Parent Connection, and any other parent education/engagement committees all coordinate together.
- STAFF: **\$0** Develop an effective parent education plan to ensure that all parents who want to can understand and communicate to others what makes Ancona distinct and excellent.
- STAFF: **\$500** Send an **annual report** to our constituents — consider a brief report for FY15; develop an outline for a more comprehensive annual report; vet with Executive Committee; send new and improved FY16 annual report.
- BOARD: **\$0** In the next twelve months, have the board do an exercise to establish and practice giving an **“elevator pitch”** for Ancona.





# Community Building

Community Building Task Force (new)

The ambitious goals outlined in this plan are only realizable with involvement from all. Students, parents, teachers, staff, and trustees need **common goals, shared work**, and focused energy to accomplish great change for Ancona. We will nurture these projects into life, cultivate them into completion, creating real, **measurable change** for this excellent landmark of learning. We who take part will be guiding Ancona into an era of invigorated purpose.



# Community Building

## Community Building Task Force (new)

- **\$0** Establish a robust set of **committees and task forces** to serve the goals of the strategic plan and to engage parents in shaping the direction of the school; outline clear and succinct goals and timeline for each group; effectively communicate these goals in a recruitment effort; engage a broad range of current families in the work, including at least 12 non-board members.
- **\$0 STAFF & BOARD:** Support however appropriate the establishment of a new parents' organization (**Ancona Parent Connection**).
- **\$15,000** Increase the **annual fund** by 30% by 2018.
  - Increase annual fund participation: identify participation rates for the past five years and establish realistic goals for FY16-18.
  - STAFF: Design and implement a program of communications and engagement for grandparents, alumni, and friends.
  - STAFF: Establish a suite of events that happen annually (like Ice Cream Social, Fun Run, Ancona Day, Spring Fundraiser, End of School Picnic, etc) that are scheduled well in advance and appropriately incorporated into the budget (Institutional Advancement Committee).
- STAFF: Strengthen our relationships with current and former families, alumni (e.g., participate in career night for students), and friends.
- STAFF: **\$500** Cultivate our relationships with our **neighbors** and the surrounding community.
- STAFF: **\$5,000 Archive** the history of Ancona.