

The Oakwood School Strategic Plan 2009-2014

Updated and Approved by Board of Trustees, June 30, 2010

GOAL [1]: The Oakwood School plans to develop a projection of growth and a master plan for expansion, improvement, and care of the physical facility.

OBJECTIVE	ACTIONS	PERSON(S) RESPONSIBLE	TIMELINE (completion of action)
1.A.: Create a 10-15-year plan for school growth, additional construction, and improvement of PK-12 facilities.	1.A.1: Establish an Ad Hoc Committee 1.A.2: Review existing site plan. 1.A.3: Gather information on the projected growth, and other demographics pertinent to the geographic area served by Oakwood. 1.A.4: Present written Plan to BOT.	BOT and Admin Planning Committee P.C. P. C.	Sept '10 May 2011
1.B.: Develop a 5 year strategic plan within the confines of 1.A.	1.B.1: Generate a 5 year budget to support a 5 year strategic plan.	P.C./Finance Committee	2013
1.C: Develop short term and long term maintenance schedules for buildings, campus, including athletic fields, driveways, parking lots and equipment.	1.C.1: Written status of existing facilities to be presented to BOT. 1.C.2: Written schedule for ongoing maintenance.	Facilities Committee Facilities Comm.	Dec. 2010 Dec 2010
1.D: Establish a reserve for long term maintenance of buildings.	1.D.1: Build into annual operating budget.	Finance Committee	Annually Dec.

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GOAL [2]: The Oakwood School plans to develop a system to assure financial responsibility and stability.

OBJECTIVE	ACTIONS	PERSON(S) RESPONSIBLE	TIMELINE (completion of action)
2.A.: Create a 5-year plan to have tuition amount be 95% of cost (tuition driven school)	2.A.1: Build the Plan	Admin	Sept 2010
	2.A.2: Project yearly tuition based upon budget and improvement needs taking into consideration market and economical environment.	Adm./Finance Committee	Annually Dec.
	2.A.23: Establish annual fund raising events.	Advancement Office	Annually May
	2.A.34: Budget for financial aid following written policies.	Finance Committee	Annually Nov.
2.B.: Analyze NCAIS teachers salaries and benefits and NC public school salary schedule to increase teachers' salaries to a comparable amount or better.	2.B.1: Determine individual or committee to analyze and make recommendations.	Ad hoc Committee to Administrator.	Sept.2010
	2.B.2: Present a plan with recommended increase to the BOT	ADM.	Nov 2010
	2.B.3: Act upon annually by including in annual budget.	Finance Committee	Annually
2.C: Integrate into the Policies and Procedures manual and keep it current	2.C.1: Gather existing policies, talk with other academic institutions re business policies, and decide what best fits Oakwood.	BOT	June 2009
	2.C.2: Develop clear written documents regarding financial aid, scholarships, and other tuition assistance, including teacher remissions.	BOT	Completed
2.D: Monitor budget	2.D.1: Status of current financial reviewed at every BOT meeting.	Business Mgr./Finance committee	Completed
	2.D.3: Annual audit of books	Same	Completed and to be done annually
2.E: Monitor Debt limit	2.E.1: Apply limit to current debt.	Finance Committee	Completed
	2.E.2: Analyze annually and report to BOT.	Fin. C.	Annually Dec.

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GOAL [3]: The Oakwood School plans to increase the professional growth opportunities for faculty and staff while continuing to employ qualified, diverse members dedicated to the academic, social, and physical development of students.

OBJECTIVE	ACTIONS	PERSON(S) RESPONSIBLE	TIMELINE (completion of action)
3.A.: Increase the number of professional growth opportunities and support with up to 1.5% of the total school's budget - to be based on budgeting constraints	3.A.1: Build staff development days, without students, into the school calendar.	Adm.	Complete
	3.A.2: Enable teachers/staff, upon request, justification and approval, to participate in PGO during school hours.	Adm.	Complete - Ongoing Ongoing
	3.A.3: Provide PGO in teaching strategies for diverse learning styles.	Adm.	
3.B.: Provide technology education and support for faculty.	(See Goal # 8)		
3C: Continue formal teacher evaluation procedures.	3C.1: Investigate and institute formal systems of teacher observation and an evaluation process.	Adm.	Complete - Ongoing
	3.C.2: Developing a mentor system for new faculty to Oakwood.	Adm.	Complete - Ongoing
	3.C.3: Establish a schedule for teacher observations and needed PGO, if necessary.	Adm.	Complete - Ongoing
3.D: Increase the Parmalee Hawk Staff Development Endowment.	1.D.1: Investigate sabbatical options and reimbursement for university classes.	Adm.	Jan. 2014
	1.D.2: Actively market endowment existence and purpose.	Advancement off.	Ongoing
3.E: Strive to increase the diversity of the faculty.	1.E.1: Actively advertise and recruit.	Adm.	Ongoing

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GOAL [4]: The Oakwood School plans to maintain a Board of Trustees that understands the roles and responsibilities necessary to hold the office and govern the school.

OBJECTIVE	ACTIONS	PERSON(S) RESPONSIBLE	TIMELINE (completion of action)
4.A: Generate an ongoing list of potential BOT members considering skills and diversity.	4.A.1: Update criteria for BOT selection. 4.A.2: Include marketing and fund raising in discussion with potential BOT candidates.	Com. on Trustees	Complete - Ongoing Annually Apr.
4.B: Create an updated orientation for new BOT members.	4.B.1: Implement on an ongoing basis	Com. on Trustees	Complete - Ongoing
4.C.: Keep current through Policy and Procedures committee	4.C.1: Refer to 2.C.2. 4.C.2: Designate individual to keep Manual updated.	BOT Chair BOT Chair	Complete - Ongoing Annually Sept.
4.D:- Continue consistency of BOT operations	4.D.1: Review By-Laws regarding BOT membership and adjust as needed. 4.D.2: Review BOT terms and adjust as needed. 4.D.3: Develop an evaluation for BOT members using NAIS as a guide. 4.D.3: Continue to cultivate the Advisory Council. 4.D.4: Adhere to NAIS and SACS policies, guidelines, recommendation 4.D.5: Plan and have an annual retreat for the BOT. (budget from Oakwood Board Development Fund)	Com. on Trustees Com. Trustees BOT Chair BOT BOT Chair BOT Chair Consultant	Complete - Ongoing Ongoing Complete Complete Ongoing Annually in July
4.E: Grow and access the Oakwood Board Development Fund	4.E.1: Actively market Fund by sharing purpose etc.	Advancement Office	Ongoing

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GOAL [5]: The Oakwood School plans to support enrichment options for students across all grades and all divisions.

Objective	Action	Person Responsible	Timeline (completion of action)
5.A.: Provide academic options that prepare students for college and also meet special interests of students.	5.A.1: Identify student interest in optional studies.	Adm.	Spring – ongoing
	5.A.2: Budget for needed new options	Finance Committee	Ongoing – funds as identified and available
	5.A.3: Monitor curriculum and graduation requirements and modify, when necessary.	Adm.	
	5.A.4: Inform BOT regarding changes fyi purposes only.	Adm.	Ongoing As needed
5B.: Increase integration of technology into curriculum.	5.B.1: See Goal #8		
5.C.: Evaluate the number of extra-curricular activities, with a focus on clubs and individual sports.	5.C.1: Establish an ad hoc committee to determine interest in individual sports and <u>school clubs</u> .	Adm.	Complete - Ongoing
	5.C.2: Assess students' interest in individual sports and clubs.	Admin & Athletic Com	Complete and Ongoing
	5.C.3: Budget for additions prior to their establishment.	Adm./Finance Committee	Annually Nov.
5.D: Strengthen Community Service Program	5.D.1: Establish an ad hoc committee to study and make recommendations to Administrator.	Adm. And BoT	Feb 2011
	5.D.2: Designate individual to coordinate and record students' service activities if recommended	Adm. And BoT	Feb. 2011
5.E: Evaluate the need for additional fine arts	5.E.1: Establish an ad hoc committee to determine interest in additional fine arts	Admin/Fine Arts Dept.	Ongoing
	5.E.2: Budget for additions prior to their establishment		Ongoing

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GOAL [6]: The Oakwood School plans to establish an Advancement Office unifying admissions, development, and communication to facilitate the enthusiastic marketing of the School.

OBJECTIVE	ACTIONS	PERSON(S) RESPONSIBLE	TIMELINE (completion of action)
6.A.: Establish an Advancement Office (includes: Development, Admissions, Communication, Marketing).	6.A.1: Budget for Director of Advancement	BOT/Finance Committee	Aug 2011
	6.A.2: Employ/designate individual to be the Director of Advancement Office.	Adm.	
	6.A.3: Develop an external marketing plan.	Advancement Off.	Dec 2010
	6.A.4: Have a written plan for admission and retention.	Advancement Off./Admissions	Dec 2010
6.B.: Maintain the position to coordinate all school communication.	6.B.1: Determine who to communicate with, and what to communicate to each group.	Advancement Officer	Dec. 2010
	6.B.2; Develop a written plan .	Adv. Off.	Dec 2010
6.C: Establish an annual advancement budget that is equal to 2% of the total budget - depending on budget constraints	6.C.1 Establish line items per area	Adm./ Finance Committee/Dev Com/M&A com	Annually Nov.

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Goal [7]: The Oakwood School plans to establish The Oakwood School Endowment.

Objective	Action	Person Responsible	Timeline (completion of action)
7.A Establish an unrestricted endowment fund.	7.A.1: Plan for a capital campaign.	Advancement Office	Complete
	7.A.2: Begin capital campaign.		June 2010
7.B: Gather existing endowments under umbrella.		Advancement Office	Complete

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Goal [8]: The Oakwood School Plans to Enhance Technology Throughout the Organization.

Objective	Action	Person Responsible	Timeline (completion of action)
8.A: Establish a reserve for ongoing technology hardware and software to be maintained and updated as budgeting permits	8.A.1: Identify tech hardware and software schedule.	Dir. Of Tech &Tech Comm Finance Committee/Dir of Tech/Tech Comm	Ongoing
	8,A.2: Build into annual operating budget. Done annually by line item and as a reserve for the unforeseen		Ongoing
8.B.: Provide technology education and support for faculty.	8 B.1: Provide PGO in technology.	Adm./consultant	Ongoing
	8.B.2: Employ a full time instructional technology faculty /staff member to provide in class assistance to teachers , staff, and students.	Adm./Finance Committee	July 2011
8.C: Increase integration of technology into curriculum.	8.C.1: Evidence in curriculum as a result of 8.B.	Adm/Finance Committee	Ongoing
	8.C.2: Budget for additional personnel in area of technology .		Completed
	8.C.3: Investigate on-line, PCC, ECU, NCAIS and other independent study or small group instruction.		Ongoing

Revision

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