

ST. MARGARET'S EPISCOPAL SCHOOL



STRATEGIC PLAN 2008

LEARNING • LEADERSHIP • SERVICE

STATEMENT OF FAITH

St. Margaret's Episcopal School embraces and teaches the Christian faith in the Anglican tradition. We believe that God calls us to love all of His children. We welcome and respect the presence of people of other religions and we see their inclusion in our community as central to our mission. As an Episcopal School we are firmly grounded in the teachings of Jesus Christ. At the same time, we are committed to nourishing the unique spirituality of each member of our school community and deepening our students' understanding of God's role in their lives.

MISSION STATEMENT

OUR MISSION AT ST. MARGARET'S EPISCOPAL SCHOOL IS TO EDUCATE THE HEARTS AND MINDS OF YOUNG PEOPLE FOR LIVES OF LEARNING, LEADERSHIP AND SERVICE.

CORE VALUES

CHARACTER

In the Episcopal tradition, we emphasize moral integrity, spiritual growth, compassion and responsibility.

COMMUNITY

We seek diversity and acknowledge the dignity of each individual within a community framework that emphasizes teamwork, mutual respect, service and commitment to the common good.

BALANCE AND BREADTH

We believe that personal growth and awareness are best fostered through the pursuit of a broad range of academic, artistic, athletic and co-curricular opportunities.

HIGH EXPECTATIONS

We guide and nurture our students as they discover and cultivate their unique gifts and talents, challenging each individual to achieve his or her full potential.



On behalf of the Board of Trustees, we are pleased to present our latest Strategic Plan for St. Margaret's Episcopal School. We believe that the definition and execution of a clear strategy is arguably the most important work of any board and we take this exercise extremely seriously. This work is the product of a comprehensive process that began last March under the leadership of W. L. Lyons Brown, III and included participants from every constituency in the school community.

In partnership with John Bird of Educators' Collaborative, the team began with a review of our 2005 Strategic Plan and quickly agreed that our mission and core values successfully embody the spirit and culture of the school and require no change. From there, we set out to study our vision statement and determined to make a significant modification. The simplest way to describe this is to say our 2005 vision for St. Margaret's was focused on how we are perceived externally while our new vision, articulated on the next page, focuses much more on how we develop our students internally. It is the Board's strong belief that if we successfully accomplish this vision, it will do nothing but burnish our external reputation.

The ensuing pages define the strategic initiatives our team identified as the most important to delivering our mission and vision over the next three years. We will have the opportunity to discuss these together during our Tartan Talks in the months ahead. In the meantime, we want to express our sincere thanks to you for your continuing support of St. Margaret's as we work together to build a great culture that produces great people.

Sincerely,

A handwritten signature in black ink, appearing to read "Marcus D. Hurlbut".

Marcus D. Hurlbut
Headmaster

A handwritten signature in black ink, appearing to read "Kenneth W. Colbaugh".

Kenneth W. Colbaugh
President, Board of Trustees

VISION STATEMENT

St. Margaret's Episcopal School is a diverse community dedicated to developing the whole child. We nurture spiritual growth, an appreciation for life-long learning, the courage to lead and a responsibility to give to others. Our graduates are independent thinkers of integrity and compassion who reveal their resilience and collaborative nature in the face of challenge and opportunity.

THREE YEAR GOALS AND OBJECTIVES

I. CURRICULUM & INSTRUCTION

OUR EDUCATIONAL PROGRAMS ARE GUIDED BY A CULTURE THAT CELEBRATES THE PROCESS OF LEARNING AND FOSTERS LIFE-LONG LEARNERS, CRITICAL THINKERS AND GLOBAL CITIZENS. INSTRUCTION IS BASED ON CURRENT BEST PRACTICES OF A PROFESSIONAL LEARNING COMMUNITY AND IS DIFFERENTIATED TO THE NEEDS OF STUDENTS WHILE COORDINATED WITHIN GRADES AND BETWEEN GRADES.

RATIONALE:

In order to best serve our students our academic program must be challenging, well-coordinated and developmentally appropriate, and our instruction must embody best practices to meet these needs.

CURRICULUM MAPPING

- Complete initial mapping across the four divisions of the school by June 2009.
- Design a process for ongoing review and revision of curriculum maps by June 2009 and complete first cycle of reviews by 2010.

21ST CENTURY LEARNING INITIATIVE

- Continue to invest in research and investigation to remain on the cutting edge of demonstrated best practices in instruction.
- Collaborate with UCI to create a research-based foundation for 21st Century Learning Initiative over a three-year period beginning July 2008.

INFORMATION SKILLS AND TECHNOLOGY

- Identify where, when and how computer-based information research and analysis skills will be included in the curriculum, as part of the mapping process, by June 2009.
- Develop a technology plan that best serves the curriculum as defined by the mapping process and that integrates technology into all aspects of school life. Complete plan by October 2009 and integrate into the 2010-11 budget planning process.
- Provide professional development training and education to faculty and staff in information technology that is consistent with curriculum goals and the strategic technology plan. By June 30, each school year, a specific education plan for the coming year will be developed, based on best understanding to date of our future needs, an assessment of current employee capabilities and priorities for improvement.

II. STUDENTS

ATTRACT, EDUCATE AND SEND FORTH ACCOMPLISHED STUDENTS
WHO EMBODY THE MISSION AND VISION OF THE SCHOOL.

RATIONALE:

*We are eager to
develop a diverse
school community of
students and families
who understand,
value and respect
the basic tenets of our
Episcopal tradition.*

ADMISSION

Identify and select students and families who are the right match for the school.

- Convene the Admission Advisory Committee annually to review policy and assess results.
- Develop and implement an admission marketing strategy to increase interest in the school.

LEADERSHIP

Central to our mission is the continued development of meaningful leadership opportunities for our students and the realization that these opportunities help prepare our students to be contributing members of the larger community.

- Promote student leadership in all divisions of the school and ensure that leadership development is an important component of the educational program and the culture of the school.
- Conduct a school-wide review of leadership opportunities currently available and develop a plan to broaden and deepen these opportunities by June 2008.

III. FACULTY, ADMINISTRATION AND STAFF

RECRUIT, REWARD AND RENEW A DEDICATED AND DIVERSE TEAM THAT
EMBRACES OUR MISSION AND VISION AND IS COMMITTED TO
SUPPORTING THE DEVELOPMENT OF OUR STUDENTS.

RATIONALE:

*Central to our vision
is the presence of a
talented, dedicated
and diverse faculty,
staff and administration
that is well compensated,
well supported and well
suited for our school
community.*

RECRUITMENT

Special focus will be directed to attracting teachers whose talents and contributions transcend the classroom and serve to enrich the personal and extracurricular lives of students and the school community.

- Review and refine recruitment strategies and hiring process with clearly defined staffing criteria and target recruiting to achieve the best outcomes on an annual basis prior to recruiting season.

PERFORMANCE

Promote and support faculty excellence through the establishment of a Professional Learning Community that requires faculty to challenge themselves and pursue continued growth.

- Broaden clinical supervision model for faculty evaluation by establishing peer-coaching protocols by June 2009.
- Standardize review programs across all divisions to drive constant accountability by June 2009.
- Develop and implement a professional development program geared to establishment of a Professional Learning Community by October 2008.

COMPENSATION

Maintain competitive employee compensation packages in order to recruit and retain the best.

- Maintain our current position in salary and benefits relative to our California peer schools and local public schools.
- Conduct comprehensive review of the cost to employees of our benefits package with special focus on medical insurance by December 2008.

IV. DIVERSITY

CREATE AN INCLUSIVE COMMUNITY WHERE INDIVIDUAL DIFFERENCES ARE RESPECTED AND CELEBRATED, AND WHERE PEOPLE FROM DIVERSE BACKGROUNDS COME TOGETHER IN A SHARED PURSUIT TO CREATE COMMUNITY.

RATIONALE:

In preparation for citizenship in a global community, our students need to develop a strong sense of their own identity, a willingness to see the common threads which run through our lives, a high regard for the value and breadth of differences, and an ability to live and communicate effectively in a complex world of many cultures, experiences and viewpoints.

- Establish diversity goals to more closely reflect the racial and ethnic demographic within a 20 mile radius by December 2008.
- Develop a plan to identify and retain a diverse community of students, teachers, administrators, staff and trustees.
- Increase outreach into the local community to attract academically-qualified, under-represented students.
- Continue to enroll at least 20 Tartan Scholars in the Upper School, and explore feasibility of expanding the program to Middle School.
- Integrate cultural awareness and sensitivity programs into divisional curricula, Middle and Upper School advisory programs, and educational programs for the broader community beginning with the 2008-09 school year.
- Maintain financial aid funding to support our commitment to diversity and seek to allocate at least 13 percent of gross tuition to financial aid by 2012.

V. COMMUNITY OUTREACH AND SERVICE

OUR MISSION AND OUR FUTURE WILL BE STRENGTHENED
THROUGH THE DEVELOPMENT OF MEANINGFUL PARTNERSHIPS IN
THE LARGER COMMUNITY.

RATIONALE:

*Community
partnerships will
deepen and strengthen
our commitment to civic
purpose and provide our
students with meaningful
opportunities to broaden
perspectives and prepare
for lives of leadership
and service.*

COMMUNITY OUTREACH

Bring further clarity to the public purpose of St. Margaret's through continued support and strengthening of Breakthrough San Juan Capistrano, Special Camp for Special Kids, the Tartan Scholars program and service learning opportunities.

- Develop strategic plan for Breakthrough San Juan Capistrano by October 2008 and Special Camp for Special Kids by October 2009.
- Increase participation of San Juan Capistrano students in Tartan Scholars Program and evaluate means to increase the total of scholarships for both Upper and Middle school students.

SERVICE

Develop a meaningful community service program through partnership with the church and others that embraces the full intent of our mission and vision.

- Review the purpose of our current community service program and develop school-wide goals and objectives to guide this program by March 2009.
- Foster and encourage a culture of giving back to our community on a local, national and global level.
- Create service opportunities for student involvement on a global level.

VI. COMMUNICATIONS

ST. MARGARET'S WILL HAVE A COMPREHENSIVE COMMUNICATIONS PROGRAM TO INTERNAL AND EXTERNAL AUDIENCES THAT PRESENTS CONSISTENT CONTENT, KEY MESSAGES AND IMPORTANT ACHIEVEMENTS TO FOSTER THE SCHOOL'S IDENTITY AND REPUTATION IN THE COMMUNITY.

RATIONALE:

As we continue to strengthen our programs and deepen our commitment to and involvement in the larger community, effective internal and external communications will be critical to building unity and support of our mission.

EXTERNAL COMMUNICATIONS

- Create a comprehensive public relations plan to tell the SMES story in the larger community on a regular basis by September 2008.
- Develop an ongoing media relations campaign by September 2008.
- Publish an annual Academic Assessment Report each June.
- Conduct an economic and community impact study with an outside research firm and issue a community report to local officials and SJC residents and business community by April 2008.

INTERNAL COMMUNICATIONS

- Improve internal communications channels with parents to include regular and consistent flow of information and sessions for in-person dialogue.
- Develop an internal understanding of St. Margaret's strategic plan, initiatives and key messages among faculty and staff.
- Enhance use of the internet as a main vehicle for communication with internal audiences.
- Continue use of Tartan Talks both school-wide and by division to communicate important school matters and initiatives with families.
- Institute ongoing communication from school administrators of analysis and progress of strategic plan including: 21st Century Learning developments, math enhancements, language program analysis, technology integration, admission process and philosophy, and financial aid policy.
- Develop and communicate a protocol for parents that addresses issue and conflict resolution in a manner that is timely, respectful and responsive.

VII. FINANCE AND ADVANCEMENT

THE SCHOOL'S FINANCIAL HEALTH AND STABILITY WILL BE SUPPORTED BY SOUND FINANCIAL MANAGEMENT AND A WELL-DEVELOPED PLAN TO PROVIDE THE RESOURCES TO ADVANCE THE SCHOOL'S MISSION.

RATIONALE:

Sound financial health is critical to our short- and long-term success. Our ongoing commitment to provide a quality and affordable education combined with demands of the 21st Century requires clearly articulated priorities and a plan to meet those goals.

- Raise funds necessary to complete Phase II and Phase III of Capital Campaign by December 2010.
- Structure the Advancement Office in a manner that reflects the needs of the school now and for the next three years.
- Increase Endowment from \$5 million to \$25 million by 2012 as a mechanism for reducing the burden on tuition income to fund financial aid, program enhancement and competitive faculty compensation.
- Grow the Annual Fund at a minimum of 10 percent in each of the next three years.
- Maintain a rolling five-year financial projection that addresses future funding needs and projects a stable pattern of future tuition fee increases.
- Maintain financial aid funding to support our commitment to diversity and seek to allocate at least 13 percent of gross tuition to financial aid by 2012.

VIII. FACILITIES

THE PHYSICAL PLANT OF THE SCHOOL WILL BE WELL MAINTAINED,
SAFE AND IMPROVED WHERE NEEDED TO SUPPORT PROGRAMS
AND SUSTAIN THE MISSION OF THE SCHOOL.

RATIONALE:

Our facilities provide one of the tools for our faculty and staff to pursue our mission. While we have been able in recent years to upgrade certain facilities, others are in need of attention as we strive to make our physical plant commensurate with the quality of our programs.

- Integrate recent land acquisitions into the Campus Master Plan by June 2008.
- Obtain City approval of entitlements for the Campus Master Plan by January 2009.
- Complete Phase II – Performing Arts Center and Middle School by December 2011.
- Define, communicate and initiate Phase III of the Campus Master Plan.
- Analyze and define objectives of summer usage of the campus and develop a strategic plan for summer programs consistent with the mission of the school by December 2008.

IX. GOVERNANCE AND BENCHMARKING

THE BOARD OF TRUSTEES WILL SUPPORT THE MISSION OF THE SCHOOL, DEVELOP AND ENSURE THE IMPLEMENTATION OF STRATEGIC POLICIES, FOCUS ON THE SCHOOL'S LONG-TERM FINANCIAL STRENGTH, STABILITY AND VITALITY AND EVALUATE AND ARTICULATE OUR STRENGTHS AND WEAKNESSES ON A REGULAR BASIS.

RATIONALE:

Effective governance will ensure that the mission, vision and strategic initiatives of the school are faithfully pursued and consistently implemented.

BENCHMARKING

In an increasingly competitive educational environment, the value of a St. Margaret's education needs to be reviewed and measured on a regular basis in order to articulate our strengths and effectively address areas in need of improvement.

- Develop a comprehensive process for benchmarking:
 - Alignment of Mission and Vision
 - Strategic plan
 - Student success
 - Faculty and administrative performance
 - Community relations
 - Student and parent satisfaction
 - Financial stability
- Complete an initial report by December 2008, to be used as part of the 2009-10 budgeting process.

GOVERNANCE

- The Board will monitor the progress of the school through annual review of benchmarking data.
- The Board will regularly review progress with implementation of this Strategic Plan; and reassess and revise the Plan in three years or sooner if deemed appropriate.
- The Board will annually review the current financial strength of the school and five-year financial projections, as part of the annual budget approval process.



Dear Friends:

A good plan is one in which many constituencies have equity. Your Strategic Planning Committee strongly supports this notion and, consequently, this work is the result of a highly collaborative process in which trustees, administration, faculty, students and parents participated. We began this exercise in March 2007 with a four-step process:

- I. Assemble the Board to formally review our last plan, evaluate our performance and commence early stage identification of strategic needs emerging on the horizon.
- II. Convene a strong representation of stakeholders in April where six working groups of five to seven people were tasked with defining a vision for the school and identifying the most important initiatives necessary to achieve that vision in the next three years.
- III. Prioritize defined initiatives based on their commonality between groups and partner with the Finance Committee to deliver a realistic plan that respects our financial objectives and condition.
- IV. Deliver a final draft to the Board on March 4, 2008 and receive approval before making it available to the St. Margaret's community.

Every participant in this process not only volunteered but also gave up weekends, nights and odd hours to contribute to this work. It was never dull and it was occasionally lively but there was never any question that passion for our school was always at the forefront.

With many, many thanks to each of you,

A handwritten signature in black ink that reads "W. L. Lyons Brown, III".

W. L. Lyons Brown, III
Chair, Strategic Planning Committee

THE STRATEGIC PLANNING COMMITTEE

W. L. LYONS BROWN III., CHAIRMAN

TRUSTEE AND LOWER/UPPER SCHOOL PARENT

DAVID G. BOYLE

ASSOCIATE HEADMASTER

UPPER SCHOOL PRINCIPAL AND ALUMNI PARENT

DAVID J. BUSH, FCMA

DIRECTOR OF FINANCE AND OPERATIONS AND ALUMNI PARENT

KENNETH W. COLBAUGH

PRESIDENT OF THE BOARD OF TRUSTEES

AND LOWER SCHOOL PARENT

THE REVEREND CANON ROBERT D. EDWARDS

TRUSTEE, RECTOR OF ST. MARGARET'S EPISCOPAL CHURCH

MIDDLE/UPPER SCHOOL PARENT AND ALUMNI PARENT

MARY J. GEORGE

FORMER TRUSTEE AND ALUMNI PARENT

WILLIAM A. HOFF

TRUSTEE, CHURCH VESTRY MEMBER

AND UPPER SCHOOL PARENT

MARCUS D. HURLBUT

HEADMASTER

SUSANNA V. OPENSHAW

TRUSTEE, CHURCH VESTRY MEMBER

AND MIDDLE/UPPER SCHOOL PARENT

KATHRYN H. PHILLIPS

TRUSTEE, BISHOP'S REPRESENTATIVE

MIDDLE SCHOOL/ALUMNI PARENT

JEFFERY L. STODDARD

FORMER PRESIDENT OF THE BOARD OF TRUSTEES (2004-2007)

MIDDLE SCHOOL/ALUMNI PARENT

SAMUEL C. WOLGEMUTH

SECRETARY OF THE BOARD

JOHN BIRD, EDUCATORS' COLLABORATIVE

CONSULTANT TO STRATEGIC PLANNING COMMITTEE

STRATEGIC PLANNING PARTICIPANTS

Titles of participants are based on their 2006-2007 school year when the Strategic Planning workshops took place. Members of the Strategic Planning Committee are not duplicated below.

ROLAND ALLEN

DIRECTOR OF COLLEGE COUNSELING

N. CHRISTIAN ANDERSON, III

TRUSTEE, UPPER SCHOOL PARENT AND ALUMNI PARENT

INGRID ANDREWS

*EARLY CHILD DEVELOPMENT CENTER DIRECTOR
AND ALUMNI PARENT*

ROBERT G. AUSE, JR.

*UPPER SCHOOL FACULTY MEMBER
AND LOWER/MIDDLE SCHOOL PARENT*

DAVID BESHK

LOWER SCHOOL FACULTY MEMBER

CYNTHIA BOBRUK

DIRECTOR OF ADVANCEMENT AND LOWER SCHOOL PARENT

THE RIGHT REVEREND J. JON BRUNO

*CHAIRMAN OF THE BOARD
AND BISHOP DIOCESAN OF THE EPISCOPAL DIOCESE OF LOS ANGELES*

JEANNINE CLARKE

*ALUMNA, (CLASS OF 1987)
MIDDLE SCHOOL PRINCIPAL
AND PRESCHOOL/LOWER SCHOOL PARENT*

RYAN DAHLEM

DIRECTOR OF ADMISSION AND FINANCIAL AID

PETER J. DESFORGES

TRUSTEE AND LOWER/MIDDLE SCHOOL PARENT

MONICA D. FURMAN

*PTF PRESIDENT-ELECT
LOWER/UPPER SCHOOL PARENT AND ALUMNI PARENT*

PAUL C. HEESCHEN

TRUSTEE-ELECT AND LOWER SCHOOL PARENT

DONALD P. JOHNSON

TRUSTEE-ELECT AND LOWER/MIDDLE SCHOOL PARENT

TAIT LIHME

TECHNOLOGY INTEGRATION SPECIALIST

WALTER LINAWEAVER, III

*UPPER SCHOOL ASSISTANT PRINCIPAL
AND FACULTY MEMBER
LOWER SCHOOL PARENT*

TRACY ANN LINYARD

LOWER SCHOOL PRINCIPAL

CAMERON H. LUKOS

UPPER SCHOOL STUDENT, CLASS OF 2010

DARLA L. MAGANA

DIRECTOR OF LIBRARY/MEDIA CENTER AND PRESCHOOL PARENT

WYATT E. MALCOLM

TRUSTEE AND CHURCH VESTRY MEMBER

REGINA MCDUFFIE, PH.D.

ACADEMIC DEAN

LENA M. MURRILLO

UPPER SCHOOL STUDENT, CLASS OF 2007

STACEY E. NICHOLAS

TRUSTEE AND LOWER/UPPER SCHOOL PARENT

LYNN OZONIAN

DIRECTOR OF ACADEMIC TECHNOLOGY AND ALUMNI PARENT

GREGORY D. PALMER

SECRETARY OF THE BOARD OF TRUSTEES AND ALUMNI PARENT

KATHLEEN PAYLOR

ASSISTANT HEAD OF SCHOOL FOR ADVANCEMENT

MERISSA L. REN

UPPER SCHOOL STUDENT, CLASS OF 2008

ANDREW C. ROBISON

TRUSTEE AND LOWER SCHOOL PARENT

BERNARD E. SCHNEIDER

TRUSTEE-ELECT AND MIDDLE/UPPER SCHOOL PARENT

MARGARITA SOLAZZO

TRUSTEE, PTF PRESIDENT AND MIDDLE SCHOOL PARENT

RYAN M. WESTENDORF

*ALUMNUS (CLASS OF 1991), TRUSTEE AND PRESCHOOL/LOWER
SCHOOL PARENT*

AUSTIN S. WHITNEY

UPPER SCHOOL STUDENT, CLASS OF 2007

JOHNELLE M. ZARUTSKIE

TRUSTEE AND FORMER LOWER/MIDDLE SCHOOL PARENT

DIVERSITY AT ST. MARGARET'S

At St. Margaret's Episcopal School, diversity is an essential aspect of our Episcopal identity. The core of our mission is rooted in the Anglican tradition which calls us to seek and serve God in all persons, loving your neighbor as yourself. We recognize that we are all spiritual beings on a human journey and that we fulfill our mission when students and families from diverse backgrounds join our school community. Our founder, The Reverend Canon Ernest Sillers recognized this when he declared "...Every student is a sacred and precious child of God, endowed with the potential to become a productive and contributing member of society."

We recognize and appreciate that diversity exists in the languages we speak, the colors of our skin, the traditions we observe, the religions we practice, the structure of our families, the financial resources we possess, the special needs we have, and the gender and age we are. We believe that our separate heritages help define us as individuals, and that our commitment to learning about one another and the larger world unites us as a school community and prepares our students for living in a complex global society.

St. Margaret's assumes an ongoing responsibility to act as part of a larger community. Through our commitment to Breakthrough San Juan Capistrano, Special Camp for Special Kids and school-wide community service programs, we seek to participate meaningfully in the larger community. In our recruitment practices for families, faculty and staff, we strive to create an inclusive school community whose membership reflects the rich diversity of San Juan Capistrano and southern Orange County.

In our curriculum we provide age appropriate opportunities for students to explore a variety of topics that serve to build the knowledge and skills needed to participate in and contribute to an increasingly complex and diverse world. We expect our students to strive for justice and peace among all peoples, and respect the dignity of every human being. Our Episcopal tradition encourages debate; welcomes diverse ideas; values ambiguity and paradox; and respects traditions other than those set out in the Book of Common Prayer.

The creation of a diverse community requires an intentional and diligent commitment of time, energy and resources. Through efforts such as financial aid and the Tartan Scholars programs, we strive to make a St. Margaret's education accessible to qualified students from underserved and under-represented backgrounds. When our students graduate from St. Margaret's, we hope we will have prepared them to be global citizens with a strong sense of their own identity, a willingness to see the common threads which run through our lives, a high regard for the value and breadth of differences, and an ability to live and communicate effectively in a complex world of multiple cultures, experiences and viewpoints.



ST. MARGARET'S EPISCOPAL SCHOOL
31641 La Novia
San Juan Capistrano, California 92675
949-661-0108 • www.smes.org