



# North Cross School

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Dear NCS Community,

In May 2012, the North Cross School community began an active and engaged strategic planning process. Experiencing the collective intelligence and dedication to North Cross that the Strategic Planning Committee members demonstrated throughout the summer was a privilege and a highlight of my service to the School. The North Cross School Strategic Plan resulted from hard work: listening, data gathering, research, planning, creative thinking, analysis, discussion, and finally, commitment. The plan serves as a vital and important document that charts the School's future with defined, actionable, and as often as possible, measurable initiatives. The planning process brought our community together toward a common vision, deepened relationships within and among our constituent groups, and leveraged the considerable strength, talent and care embedded within North Cross School. Both reinforce the School's core and lay an essential foundation for our future.

## **The Process**

Before the strategic planning process formally began, we had a basis of ideas and information from input received from the Strengths, Weaknesses, Opportunities and Threat (SWOT) Analysis workshops conducted by Headmaster Chris Proctor upon his arrival in the summer of 2011. SWOT Analysis is a common and effective strategic planning tool, and the data collected through that work helped us efficiently begin a thorough and inclusive strategic planning process.

Based on the belief that broad engagement was critical to developing a successful strategic plan, we scheduled a series of workshops open to the North Cross Community to review the SWOT Analysis data, discuss the strategic planning process, and encourage completion of a brief survey. The survey response rate was somewhat higher than expected, and we appreciated the over 300 responses from current parents, faculty and staff, alumnae, and parents of alumnae.

Once feedback from the full NCS community was gathered, the Strategic Planning Committee began its work by reviewing the demographic and survey data gathered and organized by our volunteer strategic planning consultant, Cathy Greenberg. Cathy has considerable experience in all things strategic, especially in higher education. She has worked intensively with institutions like Virginia Tech, Hollins University and Radford University. Her leadership and expertise were not only crucial to the process but also serve as a great example of the depth of talent and devotion that supports North Cross School. Another excellent example of this talent and devotion comes from within the North Cross staff. Chris Moore's significant leadership as the administrative liaison was a vital part of the planning process.

As they reviewed data, the Strategic Planning Committee also developed evaluation criteria to serve as a filter for initiatives under consideration for the Strategic Plan. They scored potential criteria and developed the following list of criteria, weighted on a 100-point scale as follows:

- Increases Enrollment
- Distinguishes North Cross
- Improves Student Experience
- Budget Neutral
- Actionable in 3-5 Years

The committee also reviewed the School's 2006 Strategic Plan, the master plan, the mission statement, NAIS and other related articles about strategic planning, selected strategic plans of peer and aspirational independent schools and innovative curriculums like Avenues: The World School, in New York City. Once they reviewed relevant material and developed and committed to their evaluation criteria, the committee was ready to brainstorm initiatives in each of five categories:

- Academics and Technology
- Buildings and Grounds
- Finance
- Institutional Advancement
- New Initiatives

After exhaustively brainstorming in each of the five categories, the Committee divided into sub-committees to evaluate each initiative against the evaluation criteria. This allowed subcommittees to focus on the best and most actionable ideas, in order to dramatically increase implementation success. Once the subcommittees vetted the initiatives, they aligned them with common outcomes under several broad strategic goal categories. Those most relevant became strategic goals within the Strategic Plan.

On July 25, 2012, the Strategic Planning Committee finalized their draft of the Strategic Plan for Board review and approval. The NCS Board of Trustees approved the Plan on August 15, 2012.

### **A Living Document**

Based on the belief that innovation is a continuous and often unpredictable process, we consider the North Cross School Strategic Plan to be a living document that can adapt to new information, trial and error, and unexpected opportunities. We have reorganized the Academic Affairs Committee to become the Academic Affairs and Strategic Oversight Committee. A core responsibility of this committee is to oversee plan implementation and generate, review and evaluate new ideas and opportunities for the School. After a thorough vetting process, the Strategic Committee will recommend ideas that warrant further exploration to the Board and administration. Members of this committee will also work with leaders of divisions and departments involved with ideas under serious consideration throughout the evaluation process. The committee's charge to oversee implementation of the Strategic Plan ensures consistent attention to progress on the Strategic Plan. This group will report to the full Board regularly.

As an added measure of focus on implementation, the full Strategic Planning Committee will review the Plan 90 days into implementation followed by a second review in the spring. Too often, plans are made, shelved and collect dust. By reconvening the Strategic Planning Committee during the first year and the appointing a Strategic Committee, we will establish mechanisms for accountability and action and work against the human tendency to forget our best laid plans. Ultimately, this Strategic Plan will be judged by its ability to prioritize and focus on essential improvements, and in turn, stimulate progressive action that is critical for our future success.

In closing, I would like to thank the Strategic Planning Committee members for playing such a critical role in the future of North Cross. They were extremely generous to commit their time and talent to develop a Strategic Plan that reaffirms our values, targets critical areas for growth and development, and advances North Cross School with clarity and purpose over the next five years. I can't wait to see what happens next.

Sincerely,



**Katherine F. Walker, PhD**

*Strategic Planning Committee Chair*



# North Cross School Strategic Plan

The North Cross School Strategic Plan is intended to adapt as new information and opportunities arise. The Board of Trustees will review the Strategic Plan on an annual basis to evaluate its implementation and ensure its continued relevance.

## Academics and Technology

**Goal:** *Create and deliver a curriculum that is rigorous, innovative, and distinctive.*

**Strategy One:** Create an environment that attracts, develops, and retains a talented, diverse faculty.

*Action Items:*

1. Investigate and implement a salary-banding strategy, if appropriate.
2. Perform a cost/benefit analysis of a tuition remission program—including grandparents who are current faculty.
3. Continue to review salary-benchmarking information to ensure North Cross remains competitive.
4. Strengthen Professional Development opportunities for faculty and staff.

**Strategy Two:** Ensure implementation, evaluation, and continued funding of existing strategic initiatives.

*Action Items:*

1. Continue aggressive implementation of the Early Childhood Program(s).
2. Grow the number of students proficient in a second language.
3. Implement and grow the Global Studies program.
4. Continue to implement the Technology Plan.

**Strategy Three:** Develop an ECP–12 Ethical/Leadership/Integrity/Life Skills Program.

*Action Items:*

1. Review existing programs.
2. Decide whether program should be integrated or stand alone.
3. Develop and implement a program for ethics, leadership, integrity, and life skills.

**Strategy Four:** Integrate critical thinking and application problem-solving skills into the curriculum.

*Action Item:*

1. Develop a strategy to integrate critical thinking and application problem-solving skills into existing and planned curriculum.

**Strategy Five:** Establish a STEM-D program.

*Action Item:*

1. Develop a strategy to enhance our current STEM-D offerings.

**Strategy Six:** Establish a community garden.

*Action Item:*

1. Plan and implement a community garden to promote learning and citizenship.

**Strategy Seven:** Investigate online offerings to augment current programs.

## **Institutional Advancement**

**Goal:** *Advance public understanding, attract and retain students, create, build and strengthen relationships, and enhance philanthropy for North Cross School.*

**Strategy One:** Develop and implement a comprehensive marketing and public relations plan that communicates the value of North Cross School to identified constituencies.

*Action Items:*

1. Identify constituency groups and define messaging to them.
2. Identify most appropriate mode of communication for each constituency group.
3. Evaluate website for more efficient communication with constituency groups.
4. Develop and implement marketing and public relations plan for each group.
5. Develop and implement a plan to utilize the head of school and willing members of the Board of Trustees for external relations.
6. Develop and implement a plan to position North Cross as a thought leader in education by leveraging faculty, staff, head of school, parents, and alumni to speak, write, perform, and participate in and for appropriate venues and events.

**Strategy Two:** Develop a comprehensive fundraising plan to support the strategic plan initiatives and annual operating budget.

*Action Items:*

1. Develop and implement an integrated data management system, including needed training.
2. Determine fundraising goals in conjunction with HOS and Finance for strategic plan initiatives and annual operating budget.
3. Determine dollar amount of goals to come from annual fund, fundraising events, corporations, foundations, and major gifts.
4. Ensure successful completion of annual fund.
5. Evaluate current fundraising events and make recommendation for continuing, replacing, or eliminating.
6. Develop and implement a plan in conjunction with the head of school for the head to spend 15% of his time fundraising.
7. Develop and implement a plan for willing Board of Trustees members to assist in fundraising.
8. Develop and implement a Corporate and Foundation fundraising strategy that includes prospect visits, the writing of grants and proposals, and stewardship.
9. Develop and implement a Fat Pencil Society to increase alumni support.
10. Improve web-site design for ease of donations.

**Strategy Three:** Attract and retain an academically talented, diverse, and socially conscious student body of 530 students.

*Action Items:*

1. Develop a recruitment plan to focus on recruitment of primary level students including relationships with pre-schools, utilization of current parents, and the leverage of current campus activities that attract non-North Cross students.
2. Design and implement mechanism(s) to gather pertinent data to define and communicate the value of a North Cross education to various constituencies.
3. Develop and implement a plan to increase retention at transition points.

**Strategy Four:** Develop a comprehensive volunteer plan that engages alumni, current parents, former parents, and others in efforts that are the most critical to North Cross.

*Action Items:*

1. Expand the list of needed functions that could be performed by volunteers.
2. Prioritize the list based upon criteria to ensure successful implementation of the Strategic Plan.
3. Develop and update brief descriptions of volunteer activity and identify staff/faculty with whom volunteers would work.
4. Develop and implement a call for volunteers to alumni, current parents, former parents, and friends.
5. Place volunteers in positions.
6. Conduct a satisfaction survey of volunteers and faculty/staff members of project.

**Strategy Five:** Increase the number and geographic variation of engaged alumni.

*Action Items:*

1. In conjunction with the Alumni Board, develop and implement an alumni communications plan that increases the frequency and quality of contacts.
2. Increase engagement and participation of alumni in a variety of areas including events, special programming, recruitment, and publications.
3. Fully implement the alumni networking and mentoring program for students, faculty, and staff.

**Strategy Six:** Evaluate Institutional Advancement staffing relative to the achievement of Strategic Plan goals and strategies.

*Action Items:*

1. Review Strategic Plan and existing operations to parse activities into categories including communications, fundraising, recruitment, data operations, events, volunteer engagement and coordination, alumni relations, community relations, and others.
2. Plot existing staffing against categories and identify gaps and opportunities to consolidate functions.
3. Conduct a cost/benefit analysis on any additional staffing.

## **Buildings and Grounds**

**Goal:** *Create and sustain a unique learning campus that is safe, secure, environmentally friendly, and reflects programmatic needs.*

**Strategy One:** Implement appropriate elements of the consolidated Master Plan.

*Action Items:*

1. Complete work on Middle School.
2. Create a long-term plan for addressing library, auditorium, and office needs.
3. Upgrade science laboratories.
4. Upgrade fields.
5. Complete utility audit.
6. Determine appropriate action for Rt. 419 corner and signage.

**Strategy Two:** Evaluate the feasibility of potential tax credit opportunities associated with our grounds.

**Strategy Three:** Use PRRSM account to conduct deferred and on-going maintenance.

*Action Item:*

1. Develop a prioritized list of deferred and on-going maintenance needs.

## New Initiatives

**Goal:** *Develop and implement new initiatives that will attract and retain students and increase the distinctiveness of North Cross School while maintaining and strengthening the financial model.*

**Strategy One:** Evaluate the potential of increasing North Cross School's regional presence.

*Action Items:*

1. Evaluate the feasibility of, and optimal locations for, additional campuses using demographic data and financial forecasting.
2. Determine type of programs and tuition structure appropriate for each target community.

**Strategy Two:** Evaluate a modest boarding program.

*Action Items:*

1. Research existing five- and seven-day boarding programs.
2. Determine market conditions for a successful boarding program.
3. Develop a financial model for boarding program.

**Strategy Three:** Establish distinctive partnerships with local colleges, universities, and community organizations.

*Action Items:*

1. Establish a faculty development program with Hollins University.
2. Investigate a partnership with Virginia Tech for opportunities in STEM-D and Institute for Creative Arts and Technology for faculty, staff, and students.
3. Investigate a partnership with Jefferson College of Health Sciences and Virginia Tech Carillion School of Medicine for faculty, staff, and students.
4. Evaluate dual enrollment opportunities to expand current program offerings.
5. Develop a process to evaluate potential partnerships.
6. Evaluate the possibility of a North Cross Cohort for MAT degree at a discounted rate.

**Strategy Four:** Develop an innovative parent education program to foster a sense of trust and community.

*Action Items:*

1. Develop topics for parent education programming.
2. Develop programming using various delivery modes, including the use of technology.

**Strategy Five:** Continue to explore and evaluate new initiatives.

*Action Items:*

1. Develop a process to evaluate potential new initiatives.

## Finance

**Goal:** *Create a Sustainable Financial Model*

**Strategy One:** Maximize/optimize tuition revenue.

*Action Items:*

1. Develop a complete tuition model to determine optimum price points for enrollment and revenue growth. The model will include the sources of funding (parents, grandparents, external, etc.), multiple child implications (family discounts), financial aid for ECP-12, other area independent school pricing, and area demographics.
2. Implement tuition pricing based upon model, monitor results, and implement a feedback loop.

**Strategy Two:** Increase non-tuition revenue.

*Action Items:*

1. Conduct a thorough examination of all existing non-tuition revenue sources.
2. Evaluate and make recommendations for expansion of extra-curricular, extended day, and summer offerings.
3. Review Carter Athletic Center rental agreements and existing programs, member access, any liability issues, and a second location of Spirit Store.
4. Develop a baseline ratio of non-tuition revenue to total revenue.
5. Develop non-tuition revenue targets for the next five years.

**Strategy Three:** Conduct cost/benefit analysis of provider(s) of appropriate school functions.

*Action Item:*

1. Evaluate insourcing versus outsourcing of school functions.

**Strategy Four:** Improve cash flow management.

*Action Item:*

1. Develop a cash flow model that enables the school to operate efficiently, including seasonal borrowing and prepayment discounts.

**Strategy Five:** Fund PRSSM account according to NAIS standards.

*Action Items:*

1. Establish annual goals for the funding of the PRSSM account.
2. Report on progress to goals.