

Carolina Friends School's Fourth Long-Range Strategic Plan

December 2008

Meeting the Challenge

To build a sustainable educational community for a responsible, global future by enhancing Carolina Friends School's capacity to equip and inspire students to learn, lead, and serve.

Building a Strategic Plan

Carolina Friends School celebrated its 40th anniversary at the beginning of a new and rapidly changing century. CFS had matured as an educational institution, laying a strong foundation for the next 40 years and more. However, although there was no longer any question that the School would survive, new challenges and responsibilities invited the question: *What will it take for Carolina Friends School to thrive?*

This query, and the sense that CFS had reached an important point of transition in its history, set the course for developing the School's fourth five-year strategic plan. The process began with a year of conversations among the many members of the School community. In each of these listening sessions, surveys, and Task Force meetings, three questions shaped the conversation: *What do you affirm about CFS? What do you want to change? What new initiatives would you recommend?*

From the collective responses emerged three clear messages, and an outline of the path ahead:

- First is the strong, loving affirmation of Carolina Friends School's character, values, and mission. We emphatically agree that our individualized approach to teaching and learning and commitments to service, community, diversity, and the environment should remain unchanged. The School's character, defined and nurtured over four decades, is the foundation for the years ahead. Responses to the second question—*What do you want to change?*—took the form of proposals to strengthen capacity rather than dramatically alter programs; suggestions about how to more fully realize the School's promise.

CFS: A School in Transition

Although the process of developing the School's fourth long-range plan began with the expectation that we would produce a clear action plan for the next five years, we learned instead that *this* long-range plan must be different. CFS is at a critical juncture in its development and this plan's focus must extend well beyond the customary five years; the strategic choices made now will form the foundation for the School's development over the next several decades.

This point of transition reflects both the School's development—much like an adolescent growing from childhood to adulthood—and the rapidly changing world for which our students must be prepared. Key factors demanding our attention include:

- A world grown smaller and more interconnected by communications technology, shared environmental concerns, and growing political and economic interdependence.
- A significantly more diverse social context.
- The School's evolution from a young school with an experimental quality to an established, enduring educational institution.
- Fiscal aspirations that cannot be met by a funding model heavily dependent on tuition.

- Second, while the School’s core is sound, the next chapters in Carolina Friends School’s story will need to reflect and embrace the extraordinary changes engulfing the world—in technology, in the use and distribution of resources, in the sciences and arts, in languages and cross-cultural understanding. The goal remains the same: through the lens and genius of Quaker philosophy, to inspire students to action—to learn, lead, and serve as world citizens.
- Third, if CFS is to strengthen its programs while preserving its character and commitment to an economically and culturally diverse community, it must significantly expand its funding sources. The School’s current funding model—which is inherently dependent on tuition—places significant limits on the School’s development, and so our ultimate goals must include “economic sustainability.” If we rely only on tuition increases for School improvements, we run the risk of becoming unaffordable.

Advancement

To reach its goal of economic sustainability, CFS requires a comprehensive advancement program to increase the School’s generative capacity and to strengthen its communications with parents, alumni, and the broader community.

As the cornerstone of the School’s development, the advancement program is of the highest priority and adding key development staff an essential first step in implementing the long-range plan. The initiatives proposed to achieve advancement goals include:

- Hiring an Advancement Director and a part-time Alumni Relationship Coordinator.
- Focusing on major gift fundraising and strengthening ties to alumni in order to increase the School’s generative capacity.
- Dedicating resources to affirming and strengthening the School’s identity through a robust program of public communication, including print and web media.
- Raising \$10 million by 2014 for operating, endowment, and capital projects.

Vision for the Future: Fulfilling the Promise

To fortify and sustain the educational environment that will realize this vision, this long-range plan focuses attention in seven key areas: economic sustainability, arts, environmental education, global/international studies, professional culture, land and facilities, and Quaker character.

Achieving Economic Sustainability Through Advancement

To more fully realize Carolina Friends School’s potential will require resources beyond those available to us from tuition and current endowment. Due to the School’s heavy dependence on tuition—which supports nearly 90 percent of the School’s budget—options for strengthening school programs are severely limited. While greatly increasing tuition or school size or altering the staff-student ratio could generate the necessary resources, such options would also change the fundamental character of the School—something we are determined *not* to do. Further, we are convinced that the School’s generative capacity can be increased through enhanced advancement efforts. Thus, long-term, the School’s success will depend on its ability to change its funding model, and this plan proposes reaching the goal of “economic sustainability” through a more comprehensive, focused advancement program. And, because future initiatives depend substantially on new resources, this advancement effort is of the highest priority.

Arts: Integral to the 21st Century Curriculum

Carolina Friends School has long been characterized by its rich traditions of dance, drama, music and visual arts—traditions at the spiritual center of community building as well as educational opportunities at the School. We have known for many years that the three Rs are essential,

but not enough; that well educated “world citizens” need both critical *and* creative thinking skills. Thus, we consider an expanded arts program as integral and essential to building a 21st century educational program. Strengthening arts education at CFS will require significant new resources—to provide enhanced facilities for dance, drama, and music instruction and performance and to properly staff a rich and fully integrated arts program.

Environmental Education: Preparing for the Global Challenges of Our Time

Building on a tradition of stewardship and taking full advantage of a campus uniquely suited for experiential environmental education, we envision Carolina Friends School as a laboratory in sustainability—implementing best practices, introducing and testing technologies and strategies, and modeling responsible environmental stewardship. The foundation for such a program is clearly established in mission and practice, but significant additional resources will be required for staff and facilities—such as an environmental education coordinator, greenhouse, energy garden, or Environmental Studies Center—to realize our full potential.

Global/International Studies: Preparing Students for World Citizenship

The goal of preparing students in our care for responsible and effective world citizenship is animated by the Quaker call to live “answering that of God in every person” and by the School’s historical commitment to social justice. We envision a CFS community defined by its “inclusivity” rather than by its diversity—emphasizing our shared journey rather than our differences. We seek to create a school community significantly more representative of the wider Triangle community. Additionally, we must expand and enrich the learning opportunities—including language instruction and Upper School End-of-Year programs—that expose students to varied cultures and prepare them to live in a global society. The School’s objectives in this area are not new, but will require greater attention and resources. Expanded initiatives must include staff responsible for outreach efforts, as well as programmatic opportunities in the form of enhanced instruction in modern languages, international relations, and public policy.

Arts

From its beginnings, CFS has recognized the importance of creative thinking and expression to quality education. The need to educate students for “world citizenship” in a culturally diverse society intensifies the importance of the creative arts in the CFS curriculum.

This plan therefore proposes expanding performing arts education opportunities and more fully integrating art in the curriculum. The initiatives proposed to achieve these goals include:

- Securing funding for dramatically enhanced performing arts space.
- Endowing a position and operating budget for an Arts Coordinator.

Environmental Education

Carolina Friends School's long commitment to stewardship provides an excellent foundation for an educational program that meets the environmental challenges facing the world.

This plan envisions CFS as a role model in environmental education—by implementing best practices, introducing and testing technologies and strategies, and modeling the reduction of our environmental footprint. Comprehensive environmental education would include experiential learning opportunities as well as collaborative projects with other educational institutions. The initiatives proposed to achieve these goals include:

- Endowing a position and operating budget for an Environmental Education Coordinator.
- Expanding instructional opportunities in environmental education.
- Securing funding for dramatically enhanced environmental education facilities.

Global/International Studies

Preparing students for “world citizenship” involves both the curriculum and the culture of the School.

This plan seeks to build on a history of inclusivity to create a community more representative of the greater Triangle community, and to expand learning opportunities that expose students to a variety of cultural and interpersonal relationships. Equally important are curricular enhancements, including instruction in modern languages, international relations, and public policy. Initiatives proposed to realize these goals include:

- Hiring a half-time Intercultural Coordinator to strengthen diversity/inclusivity.
- Focusing on: relationship-building efforts with populations underrepresented at CFS; strengthening current support efforts for students and families; and helping CFS reach its long-term goal of increasing student body diversity by increasing the applicant pool of new families.
- Recruiting and sustaining an inclusive Board of Trustees.
- Increasing tuition aid funding pool to 11-12% of tuition income.
- Adding at least one modern language teaching position, funded either by endowment or the operating budget.
- Fully endowing the Upper School End-of-Year Experience.

Professional Culture: Nurturing Our Staff

The Carolina Friends School experience as “a dynamic community of learners” within which “truth is continually revealed” has long reflected the belief that adult learning directly benefits student learning. Thus, realizing our vision requires that we also nurture in our staff that which we aspire to nurture in our students. Among the initiatives that will strengthen staff development are improvements to technology infrastructure and budgetary support for school-wide staff development to encourage teaming, leadership roles, collegial inquiry, and mentoring. Since good staff compensation and benefits are also an integral part of professional culture, financial-planning services for all staff, and increased retirement-plan contributions for long-term staff are proposed for the duration of this plan. The School also will consider a plan for early or phased retirement.

As the School moves to meet the longer-term goals of the plan, adding administrative support in the form of an Academic Coordinator offers the potential for enhanced curricular coherence and professional development.

Land and Facilities: Nurturing Our Learning Environment

The context in which CFS seeks to realize its vision is its teaching-learning environment—its land and facilities. The School has long recognized the vital, inextricable relationship between what and how students learn and the

environment in which learning takes place. Commitments to stewardship, simplicity, and community are reflected in the facilities throughout the campus. This plan acknowledges the importance of that environment and addresses two key areas of attention if CFS is to realize its vision: immediate facilities improvement needs and a long-term plan for developing the School’s learning environment.

In the short-term, the focus is on existing space and equipment needs—particularly in the areas of Middle School and Lower School science, art, and music instruction. A number of modest improvements in existing facilities will significantly improve instructional options in these areas. Therefore, the plan focuses on a number of initiatives to optimize the use of existing buildings by improving classroom, laboratory, and office space.

The longer-term needs demand a broader perspective. Ambitious goals in environmental education, arts instruction, intercultural experiences, and global/international studies have major implications for the School’s facilities, infrastructure, and staffing. In addition, CFS is blessed with a gift of land that, in time, will be available to support ex-

panding programs. We will need to consider not only the kinds of new or expanded facilities we will need to support curricular goals, but the most effective ways to use both new and existing resources. Therefore, this plan proposes the development of a master land-use plan, reflecting the anticipated requirements of the curriculum improvements and including exploration of options for using the life estate land gift from the Klopfer family.

Quaker Character: Preserving and Strengthening the Spiritual Foundation of the School

Intensely child-centered rather than systems-centered in its approach, valuing the spiritual dignity of each person, and building on a long tradition of integrity between mission and practice, Carolina Friends School is, first and foremost, a Quaker school. Its Quaker values are the foundation of its educational program, reflected in its everyday practice, and that which animates the School’s commitment to excellence. From these roots grows a school that affords students real responsibility for their learning, their community, and their character; a learning environment deliberately integrating art, service, and stewardship in its academic program; and a school deeply committed to both individual and community needs.

As we work to fulfill the School’s potential through expanded and improved programs, we must also renew our commitment to its Quaker character, and to ensuring that its values continue to be expressed in classroom and community. In particular, this plan emphasizes the School’s continuing commitment to its Quaker values, made increasingly explicit and accessible to all members of the community. Critically, the plan recognizes the inherent benefit of the relationships with Durham and Chapel Hill Friends Meetings and the importance of continuing to nurture these relationships.

Realizing the Vision: A Plan in Two Stages

Our vision for Carolina Friends School’s future is far-reaching—extending well beyond the customary five-year time frame of a strategic plan. It is a blueprint for the “next 40 years” and more, a plan to realize the full potential of this remarkable school. And, while it is ambitious, we believe it is fully achievable—not immediately, and not all at once, but by systematically making the fiscal and programmatic changes identified.

Carolina Friends School’s financial position has real strengths. The School has no debt, a growing endowment, and even now provides a higher level of tuition aid than most inde-

Professional Culture

As a “dynamic community of learners,” Carolina Friends School is committed to the belief that professional development and professional support are of direct and important benefit to students. The instructional infrastructure—particularly the communications and educational technologies—is also a critical component of a supportive professional culture.

This plan proposes a number of initiatives to meet the need to provide staff support. Some—such as retirement compensation support—are long-deferred; others—such as increased support for technology infrastructure—reflect the changing priorities of 21st Century education. Initiatives proposed to support professional development include:

- Implementing a tiered staff retirement plan with the goal of increasing the retirement accumulations of veteran staff authorized for the period covered by this long-range plan.
- Providing School-funded financial planning.
- Developing a mechanism for funding early- or phased-retirement arrangements.
- Increasing the annual budgetary commitment for technology spending in order to fortify the School’s technology infrastructure.
- Maintaining parity of staff compensation with benchmark schools.
- Increasing the budget for school-wide staff development.
- Establishing Academic Coordinator position to support professional development and curricular coherence.

pendent schools in North Carolina. The recently completed capital campaign demonstrated both the potential and ability to generate significant support for the School from sources other than tuition.

A number of the initiatives proposed in the next few years can be accomplished within the School's existing tuition-based financial structure. They include adding advancement and intercultural staff, addressing staff retirement benefit needs, improving support for technology, and facilities improvements. But these initiatives stretch the capacity of our tuition-based system to its limits. This dependence on tuition—for nearly 90 percent of the budget—is too great to allow us to address the full scope of this plan. More ambitious and costly goals to enhance arts, environmental, and global education programs will require new sources of revenue—from gifts and, eventually, from increased endowment.

Thus, a two-stage strategic plan emerges. The School's 50th anniversary—in 2014—provides a time frame for the first stage. During this period, the focus will be on addressing immediate needs to strengthen the School's programs and to build the foundation

for a different funding model. Longer-term—over the next several decades—our goal will be economic sustainability, by which we mean a financial model that will preserve the character and accessibility of the School and reduce significantly its dependence on tuition.

Land and Facilities

An excellent teaching-learning environment—reflected in quality facilities and materials—is fundamental to the School's success. Safe, well-designed, and sufficient spaces—for science, art, athletics, music, community gathering, staff planning, and even storage—are of critical importance in realizing the goals of the long-range plan.

In the first stage of the plan, the focus is on addressing pressing needs to upgrade existing facilities. Modest renovation projects, recommended by the Land and Facilities Task Force, will provide immediate improvements in a variety of School programs, including expanded instructional opportunities in science, much needed support for staff, and improved efficiency. These renovations and enhancements include:

- Expanded Middle School space for science and computer labs and art
- Expanded Lower School space for library, art, and music
- Conversion of Quaker Dome to multi-purpose facility
- Increased storage space
- Other building enhancement projects.

To fully realize the vision of the long-range plan, CFS anticipates major expansion initiatives on its campus, including the development of its land gift. This will require additional planning to include:

- Expanding and developing new facilities for performing arts, environmental education, a shop, and athletics, such as tennis courts and fields.
- Exploring options for using the life estate land gift from the Klopfer family to further the educational goals of the School.

First Steps: 50th Anniversary Goals

Preserving Carolina Friends School's character, size, and accessibility is our highest priority. Thus, at least in the short-term, options for funding new initiatives and improvements are limited and still depend primarily on tuition. Securing new sources of revenue and building endowment is a slower process. In fact, during this period, the decision to maintain the School's size will result in an *increased* dependence on tuition, and may require a tuition increase significantly higher than has been customary. That said, many initiatives now planned are key steps in bringing about change in the School's financial model over time.

The first stage of the plan will support the following initiatives to meet goals for advancement, global education, staff support, facilities improvement, and technology.

Immediate Budgetary Priorities (with target dates)

- **Enhance the advancement/development program** to increase the School's generative capacity; **add administrative staff** in the form of an **Advancement Director and part-time Alumni Relations Coordinator** with a focus on major gift fundraising and strengthening ties with alumni. *(beginning in 2009)*
- **Renovate and enhance existing facilities** through major gifts and/or internally-borrowed funds, with debt service to be financed by a very modest enrollment increase of up to 20 students; with no additional staffing. *(completed by 2014)*
- **Implement a tiered retirement benefit structure** with the goal of increasing the retirement accumulations of veteran staff authorized for the period covered by this long-range plan. *(beginning in 2009)*
- Providing **School-funded financial planning to staff**. *(beginning in 2009)*
- **Increase the annual budget-funded commitment to technology spending** in order to fortify the School's technology infrastructure. *(by 2010-11)*
- **Hire a half-time Intercultural Coordinator** to strengthen diversity/inclusivity; focus on relationship-building efforts with populations underrepresented at CFS; and assist in reaching the long-term goal of increasing student body diversity. *(beginning in 2010)*
- **Increase the tuition aid funding pool** to 11-12% of tuition income. *(by 2014)*
- **Raise \$10 million** for operating, endowment, and capital projects. *(by 2014)*

Additional Initiatives to be Enacted as Resources Become Available:

- Construction of **expanded performing arts space**.
- Addition of at least one **modern language teacher**.
- Full endowment funding of **Upper School End-of-Year Experience**.
- Significant budgetary increase for **school-wide staff development**.
- Establish **Academic Coordinator position**.
- Endowment of **Arts Coordinator position**.
- Endowment of **Environmental Education Coordinator position**.
- Development of a **master land-use plan**.

Quaker Character

Quaker values are the foundation of Carolina Friends School's educational approach and success. As the School moves to fulfill its potential through expanded and enriched programs, it must be equally committed to preserving the fundamental connection between these values and the School's curriculum and community.

Therefore, this plan calls for a commitment to continuing education—for students, staff, and parents—about the School's Quaker roots, and strengthening connections to Quaker institutions beyond the School. Initiatives include:

- Continuing our commitment to and education about the School's mission, Quaker character, accessibility, and values.
- Continuing to nurture relationships with Durham and Chapel Hill Friends Meetings.
- Considering creation of a Friends Speaker Series and Friends in Residence program.

Next Steps: Completing the Vision

The ultimate long-range goal of this plan is to change the School's funding model: to acquire revenue sources beyond tuition that will reduce dependence on tuition even as school programs, staff, and facilities grow and improve. Acquiring these revenue sources will include building endowment, seeking targeted capital gifts, and exploring additional revenue streams.

Goals for a New Financial Model:

- Significantly **reduce dependence on tuition** for operating expenses.
- Significantly **increase funds for tuition aid** to strengthen economic and cultural diversity in the CFS community.
- Significantly **increase generative capacity through advancement efforts**, including: building annual fund, building endowments, cultivating alumni giving, cultivating major capital gifts, and developing additional revenue sources (such as auxiliary programs).

Even as we pursue these objectives, specific recommendations outlined in the vision statement—for enriched arts instruction, environmental education, global citizenship, and professional development—will be enacted. The “first steps” outlined above are those that can be accomplished within the limits of our current financial structure. Other recommendations will be met as external funds and/or staff become available.