



The O'Neal School Strategic Plan

**Prepared in 2006
Evergreen**

STRATEGIC PLANNING PROCESS

The O'Neal School is experiencing a dynamic time of change and growth. With the ongoing capital campaign, the arrival of our new headmaster, and increasing enrollment, the school is in the right position to revise the school's strategic plan. With a focus on the mission of the school, we are excited about this road map for the future of the O'Neal School.

The strategic plan has been developed by way of contributions from:

- The still viable 1995 O'Neal Long Range Plan
- 1997 Review of this Plan
- 2001 Strategic plan
- New South Associates 2004 review
- O'Neal parent Survey of 2004
- Outline of Strategic Plan 2004
- O'Neal School By-Laws
- SAIS and SACS report of 2005
- The vision of our students, faculty, parents, alumni, and trustees.

This 2006 O'Neal Long Range Strategic Plan is our map for guiding all involved to advance the O'Neal School in an environment of continual improvement. It encompasses all the efforts of the past years and consolidates these into one document that should be shared with our students and those who care for, work for, and educate at the O'Neal School.

STRATEGIC INITIATIVES

Within the plan, there are seven strategic initiatives that define the foundation of this plan. With a focus on these fundamental areas and the detailed action plans that will continually be derived from them, there will be a strong and focused direction for the school for the next 5 years. These initiatives, which will be further detailed later in this document, are as follows:

1. The School will make every effort to retain high-quality faculty by:

- **Offering a competitive salary package that is the highest (by median salary) of any independent school in our NCAIS peer group and which compares favorably to any school in the area from which we draw our students;**
- **Providing a benefits package, competitive with any independent day school in our NCAIS peer group;**
- **Maintaining and enhancing our professional growth program to include:**
 - **A peer coaching/mentoring program;**
 - **Individual professional growth plans for each faculty member.**
- **Providing an enhanced faculty recognition program;**
- **By maintaining an environment that is appropriate to our mission as a school and includes:**
 - **Small class sizes;**
 - **Admissions standards that assure a capable, diverse, and motivated student body;**
 - **Clear expectations for faculty and student performance;**

- **Maintenance of facilities and equipment appropriate to meeting our mission as a school.**

2. The School will provide, at every grade level, a broad range of opportunities for students to both participate in and learn appreciation for the Arts.

3. The School will develop a schedule in grades 7-12 that:

- **Will be flexible enough to allow a smooth cross over between divisions for both faculty and students;**
- **Will allow students the broadest possible range of academic choices with a minimum conflict;**
- **Will maximize the time available for teachers and students to work together outside the classroom.**

4. An effective transportation system will be maintained to support recruitment and retention goals and off-site educational and extramural programs.

5. The Administration will consider institution of policies that place a strong emphasis on the retention of current students.

6. To assure long-term financial viability, the Finance Committee and the administration will develop a plan to remove the long-lingering operating deficit.

7. To assure the School's physical plant is capable of supporting a school of 525 students, the School must take the actions necessary to complete Phase III of the campus master plan.

MISSION STATEMENT

The Board has reaffirmed our Mission Statement that provides a concise summary of the School's values, goals and purpose. The mission statement is the foundation of the long-range planning process and of all our long-range planning efforts.

O'Neal is a college preparatory school dedicated to the development of academic excellence, strength of character, and physical well-being of its students in an environment where self-discipline, integrity, and consideration for others are fundamental.

STATEMENT OF PHILOSOPHY

O'Neal promotes excellence at all levels of school life. Students participate in a demanding preparatory program, complemented by extensive co-curricular opportunities. The total O'Neal experience encourages students to reach their fullest intellectual, moral, aesthetic, creative, and physical potential. Implicit in this challenge is the School's belief that, as students mature, they should assume an increasing responsibility in shaping their own educational experiences. Accordingly, they develop the initiative, self-reliance, and independence essential for reaching their full potential and for making the most of their years at O'Neal and beyond.

The O'Neal experience is based on mutual respect and personal integrity. All members of the community are expected to honor the rights of others, to conduct themselves at all times in a moral and decent manner, and to see this responsibility as an integral part of their lives at O'Neal and as citizens of the larger community of the world. The foundation of this belief is the Honor Code that sets the ethical standard that underlies every dimension of school life.

O'Neal encourages close personal relationships among all of its members, in order to nurture and guide its students. These relationships create an atmosphere of trust and support in which students see independence, initiative, and imagination as the means to pursue self-discovery, develop qualities of leadership, and affirm a sense of self worth. Imbued with these values, students give freely of their time and talents, mindful of how these contributions enhance the quality of school life for the entire community.

O'Neal is a diverse community joined by a single vision. All members, including trustees, administration, faculty, staff, students, parents, and alumni, contribute to the School in many different ways but share a unified and consistent commitment to the mission of the O'Neal School. At the core, this commitment is to provide a superior education to prepare children for a meaningful life.

GOVERNANCE SECTION

Goal

The Board of Trustees is responsible for the mission of the school.

Objectives

1. The Board has ultimate responsibility for policy and institutional priorities, fiscal integrity of the School, and support and assistance to the Headmaster.
2. The Board is responsible for the selection and reappointment of the Headmaster and for the annual evaluation of his performance based on a defined set of goals.
3. The Board will strive to have its composition reflect the diversity of the School's constituents and possess the skills and commitment necessary to serve the School's mission.
4. The Board will, on a continuous basis, educate its members and evaluate its performance concerning independent school trusteeship and governance.
5. The Board will review the School's strategic initiatives and Long-Range Plan on an annual basis.
6. All Trustees will actively participate in the School's development activities in support of the mission of the School.

ADMINISTRATION SECTION

Goal

The Headmaster of The O'Neal School serves as its chief executive officer and academic leader in carrying out the School's mission and the policies of the Board of Trustees.

Objectives

1. The Headmaster will hire, motivate, and support an outstanding faculty and administrative staff.
2. The Headmaster will assure accountability of the faculty via a well-articulated system of evaluation and review.
3. The Headmaster will ensure that the administration emphasizes cross-divisional participation and coordination to ensure alignment, coordination, and development of both pedagogy and program across the full school curriculum.
4. The Headmaster will maintain and strengthen relationships with our professional organizations; encourage interaction with other schools with similar objectives; and otherwise track trends and forecasts in PK-12 education.
5. The Headmaster will see that the administration develops and carries out a plan for the professional growth and development of faculty and staff.
6. All admissions policies and financial aid will be under the supervision of the Headmaster, who will report annually to the Board regarding criteria, resultant demographics, and other outcomes of interest.

FACULTY SECTION

Goal

The O'Neal School will identify, recruit, and retain an outstanding faculty committed to achieving the mission of the School.

Objectives

1. The School will recruit a diverse faculty who are:

- Experts in their subject areas with excellent classroom management skills;
- Positive role models of good citizenship and personal integrity;
- Life-long learners who inspire a love of learning in their students.

In addition, the faculty must have the willingness and ability to:

- Employ a variety of teaching styles to meet different learning styles;
- Work with technologies that enhance education and incorporate them into their classes in appropriate ways;
- Engage students in discussions of ethical issues both in curricular settings and through the many teachable moments that present themselves throughout the academic year.

2. **The School will make every effort to retain high-quality faculty by:**

- **Offering a competitive salary package that is the highest (by median salary) of any independent school in our NCAIS peer group and which compares favorably to any school in the area from which we draw our students;**
- **Providing a benefits package, competitive with any independent day school in our NCAIS peer group;**
- **Maintaining and enhancing our professional growth program to include:**

- **A peer coaching/mentoring program;**
- **Individual professional growth plans for each faculty member.**
- **Providing an enhanced faculty recognition program;**
- **By maintaining an environment that is appropriate to our mission as a school and includes:**
 - **Small class sizes;**
 - **Admissions standards that assure a capable, diverse, and motivated student body;**
 - **Clear expectations for faculty and student performance;**
 - **Maintenance of facilities and equipment appropriate to meeting our mission as a school.**

3. The School will continue to support a clearly defined faculty evaluation system.

EDUCATION SECTION

Goal

The O'Neal School will continue to strengthen a well-balanced, academically challenging liberal arts curriculum that emphasizes critical thinking, love of learning, and character education.

Objectives

1. The curriculum will include:

- A course of study that is well articulated both within and across grade levels and school divisions;
- An emphasis on ethical themes in every appropriate context;
- Multiple teaching styles and an appropriate emphasis on collaborative learning;
- A regular review and assessment process;
- A vigorous student assessment program, including competency expectations at key grade levels.

2. The School will support appropriate integration of state-of-the-art technologies and information systems into all aspects of teaching, learning, and administration in order to:

- Create and maintain a flexible and integrated technological environment that is easily accessible to everyone at O'Neal;
- Ensure that all students and faculty have the set of technological competencies necessary to meet the mission of our school.

3. The School will provide, at every grade level, a broad range of opportunities for students to both participate in and learn appreciation for the Arts.

4. The School will develop a schedule in grades 7-12 that:

- Will be flexible enough to allow a smooth cross over between divisions for both faculty and students;**
- Will allow students the broadest possible range of academic choices with a minimum conflict;**
- Will maximize the time available for teachers and students to work together outside the classroom.**

5. The School will continue to support an Academic Enrichment Program that assists students throughout the School to ultimately take full responsibility for their studies.

ADMISSIONS SECTION

Goal

The O'Neal School's students and prospective students are expected to be self-motivated and ethical, to value academic achievement, and to respect fellow students and faculty.

Objectives

1. The School's admissions policies and practices will emphasize development of the strongest possible pool of applicants.
2. The School will maintain admissions policies that recognize both the desire for a diverse student body and the important role that siblings, legacies, and faculty children play in creation of a well-balanced school environment.
3. The School will review, revise, and standardize financial aid procedures and policies and annually evaluate these procedures for effectiveness.
- 4. An effective transportation system will be maintained to support recruitment and retention goals and off-site educational and extramural programs.**
- 5. The Administration will consider institution of policies which place a strong emphasis on the retention of current students.**
6. The Administration will consider methods of enhancing summer programs, both as a source of income and as a recruitment tool.
7. The Administration will give special attention to enhancement of after-school programs for lower and middle school students.

8. The Admissions office will develop and institute a comprehensive marketing plan.

DEVELOPMENT SECTION

Goal

The O'Neal School will maintain a strong alumni and development program that will provide the financial leadership necessary to make the School's mission a reality.

Objectives

1. The School will create a comprehensive plan to fund the initiatives of the long-range plan, grow the endowment, and retire all long-term debt.
2. The School will establish a well-articulated planned giving program.
3. The School will establish and maintain an ongoing program of cultivation and solicitation of major gifts.
4. The School will maintain its tradition of annual support and provide a communications plan to educate and update our constituencies about our mission, objectives, needs, and progress as measured against the Plan.

FINANCE SECTION

Goal

The O'Neal School will have a balanced annual operating budget and engage in financial planning to secure the School's financial future.

Objectives

1. The Finance Committee of the Board, together with the Headmaster and the Chief Financial Officer, is responsible for overall financial review and budget development and will recommend to the Board policies that guide the financial management of the School.
2. The administration will annually update a five-year forecast of tuition, compensation, financial aid, and operating expenses.
3. The School budget will provide adequate funding for the plant fund (through funding of depreciation in the operating budget) to ensure proper maintenance and renewal of our facilities.
4. Tuition will be maintained at levels necessary to provide for excellence in all areas of the O'Neal experience.
- 5. To assure long-term financial viability, the Finance Committee and the administration will develop a plan to remove the long-lingering operating deficit.**
6. The School will consider plans to move revenue generated from both the annual fund and the annual auction to line items in the succeeding annual operating budget.

PHYSICAL PLANT

Goal

The O'Neal School will maintain and upgrade on a continuing basis its physical plant in order to fully support the educational mission of the School.

Objectives

1. A facilities master plan needs to be updated as necessary to support planning activities.
2. Priority will be given to physical safety of the O'Neal community.
3. Design, renovation, and maintenance work will be undertaken with a view toward continually improving the aesthetic environment of the School through careful attention to landscaping, signage, and flow of vehicular and pedestrian traffic.
- 4. To assure the School's physical plant is capable of supporting a school of 525 students, the School must take the actions necessary to complete phase III of the campus master plan.**