

Strategic Plan for Phillips Academy

Adopted by the
Board of Trustees of Phillips Academy
October 2004

PHILLIPS ACADEMY STATEMENT OF PURPOSE ¹

Phillips Academy, a residential secondary school, seeks students of intelligence and integrity from diverse cultural, racial, socioeconomic, and geographic backgrounds.

The school's residential structure enables faculty to support students in their personal, social, and intellectual development. The academic program fosters excellence in all disciplines within the liberal arts tradition. Faculty members guide students in mastering skills, acquiring knowledge, and thinking critically, creatively, and independently. The school strives to help young people achieve their potential not only intellectually, but also artistically, athletically, and morally, so that they may lead responsible and fulfilling lives.

The Academy is committed to establishing a community that encourages people of diverse backgrounds and beliefs to understand and respect one another and to be sensitive to differences of gender, ethnicity, class, and sexual orientation. In its programs the school seeks to promote a balance of leadership, cooperation, and service, together with a deeper awareness of the global community and the natural world.

Andover's 1778 Constitution charges the Academy to prepare "youth from every quarter" to understand that "goodness without knowledge is weak...yet knowledge without goodness is dangerous." This obligation challenges students in mind, body, and spirit to see beyond themselves and to go beyond the familiar; to remain committed to developing what is finest in themselves and others, for others and themselves.

PREFACE

At the heart of this strategic plan is a reaffirmation of the school's historic and distinctive mission, first articulated in the Academy's Constitution of 1778 and then re-stated in the Academy's most recent Statement of Purpose (see above), to educate "youth from every quarter." Our goal reflects the components necessary to accomplish this task in the twenty-first century. We confront a world that is ever more interdependent, yet one that is rife with cultural difference and an increasing divide between rich and poor, both nationally and internationally. We seek to ensure access to the Academy for young people of talent, intelligence, and integrity from a wide range of backgrounds and to provide those young people with an excellent education offering each an opportunity to thrive at Andover. These paired values of merit and equity speak to the inclusiveness and capacity for renewal that are the hallmarks of American society at its best. We are committed to the enduring excellence of an Andover education, and we recognize that excellence today requires a commitment to diversity.

We must also acknowledge the high cost of an Andover education. Currently it costs approximately \$50,000 a year on an all-inclusive basis to educate an individual student at

¹ As revised and approved by the faculty in completing the Academy's self-evaluation as a part of the New England Association of Schools and Colleges (NEASC) accreditation process in 2000.

the Academy, which represents an enormous investment (tuition covers only about 60% of the cost of educating a student at Andover). Such resources must serve a larger purpose than individual enhancement. We must seek and prepare young people who are ready to give of themselves as well as to achieve. In this endeavor we must reinforce our mission to be a private school with a public purpose.

We have one strategic goal: to reaffirm the mission of Phillips Academy to be a school that educates youth from every quarter through a program that effectively challenges them to develop their potential and to depart as thoughtful, versatile, responsible participants in the global community. This goal has three necessarily interconnected components. First, we seek to ensure access to the school for young people of talent, intelligence, and integrity from diverse cultural, geographic, racial, and socioeconomic backgrounds. Second, we seek to educate these youth through a rigorous academic program that challenges and supports them in their talent and diversity. Third, we seek to attract and retain a talented and diverse faculty that is capable of and committed to educating youth from every quarter and preparing them for participation in the global community.

Previous strategic plans have kept in mind the quality of the program and the importance of a diverse community. However, none has made either of them the top strategic priority. In the plans of 1988 and 1993, for example, the educational program and the importance of diversity were either the third or fourth goal. Over the past fifteen years, the Academy has focused a great deal of attention on improving residential life, reducing the size of the school, increasing faculty compensation, renewing the plant, progressing toward financial equilibrium, and completing Campaign Andover. These wise and necessary pursuits have laid a sure foundation. We are now in a position of strength to return to and to deepen our core educational commitment to merit and equity.

The plan includes initial recommended implementation steps. We recognize that more steps will be developed as the plan is put into effect and as new information and ideas emerge.

STRATEGIC GOAL: To reaffirm the mission of Phillips Academy to be a school that educates outstanding youth from every quarter by effectively challenging them to develop their potential and to depart as thoughtful, versatile, responsible participants in the global community.

Component #1: To reaffirm the mission of Phillips Academy to be a school that seeks youth from every quarter by ensuring access to the school for young people of talent, intelligence, and integrity from diverse cultural, geographic, racial, and socioeconomic backgrounds.

Rationale: Creation of an inclusive community is a core objective of the school, part of our historic mission to be both democratic and meritocratic. A highly qualified and diverse student body enhances education for all. It invites a convergence of talent and perspectives that sharpens wits, engenders new empathies, and broadens the vision of all concerned.

Implementation:

1. Increase financial aid to provide sufficient funding to allow the Academy to admit the most highly qualified applicants from across lower, middle, and upper-middle income bands. The school is moving to 40% of the student body on aid by September 2005. The Board of Trustees will assess the school's ability to increase that percentage, or at a minimum to sustain it, in January 2006. The goal is to offer admission without regard to financial need.
2. Enhance recruitment efforts to attract youth of talent, intelligence, and integrity from every quarter.
3. Maintain the size of the school at approximately 1070 students to preserve a diverse student body and the breadth and depth of the curriculum. The broadest recruitment effort requires increasing the boarding population to 75% of the student body. Increasing the boarding population will necessitate adding more beds on campus. This may involve adding beds to existing dorms and/or constructing one or more new dorms.
4. Identify the cost and raise the financial resources, both in endowment and operating funds, necessary to enable the school to admit students without regard to financial need.

Component #2: To reaffirm the mission of Phillips Academy to be a school that educates youth from every quarter by offering a rigorous academic program effectively challenging and supporting students in their talent and diversity, in their curiosity and passion.

Rationale: We are committed to the intrinsic value of a liberal arts education, with its grounding in the arts, humanities, and sciences, to prepare young people for lifelong learning. At the same time we must acknowledge the challenges that come with talent and diversity. Our program needs to be flexible enough to serve the students we bring

here by design. The junior and lower years have become increasingly rigid with the incremental accumulation of requirements, both academic and non-academic. This rigidity makes it difficult for students with a special interest, whether already identified upon entry to Andover or developed while at the school, to pursue that interest in depth until the upper or even senior year. Equally important, the current program makes it difficult to attend to the needs of students who enter with weak preparation. Honoring as ever the importance of hard work as a condition of achievement, we must attend more carefully and proactively to the appropriate support of our students. A further consequence of an overloaded program is the difficulty in generating curricular reform through interdepartmental cooperation, new pedagogies, and interdisciplinary courses, whose virtual absence from the Andover program is conspicuous. The faculty's ability to respond programmatically to a changing world is thereby diminished.

Implementation:

1. Achieve greater flexibility in the total program by revising program requirements. In this endeavor, we take the total program to include academics, residential life, the co- and extracurricular activities in the arts, athletics, and other required or expected elements. In this process, we reassert the primacy of the academic program and emphasize the importance of protecting it.
2. Redress uneven academic preparation before Andover through summer initiatives, complementary work, and new forms of mentoring. The academic preparation of a talented and diverse student body will not, of course, be uniform. In order to address this problem while maintaining our high academic standards, we will need to enhance some students' preparation and/or accelerate their progress periodically.
3. Improve the advising system in order to accommodate the needs and encourage the interests of each student throughout his or her time at Andover. Although greater support for advising has been introduced recently, still more support and training may be necessary. With particular attention to the roles of the advisor and house counselor, examine and evaluate protocol for communication with families of current students.
4. Review the coordination and effectiveness of existing support services and co-curricula. These include, but are not limited to, the Academic Support Center, the Oliver Wendell Holmes Library, Psychological Services, Life Issues, and the Office of Community and Multicultural Development.
5. Examine and evaluate with institutional research the guidance and support we provide for the students in our program.
6. Engage the question of global citizenship and its implications for our educational program.
7. Review the current budget for the program with the objective of identifying the resources required to adapt the program to meet the requirements of the students enrolled. This may result in a reallocation of existing financial resources as well as the need to raise additional funds.

Component #3: To reaffirm the mission of Phillips Academy to be a school that serves youth from every quarter by attracting and retaining a talented and diverse faculty committed to the educational and community values of the school.

Rationale: To achieve its core mission, the Academy relies on a talented, engaged, and diverse faculty to design, implement, and refine its educational program. This faculty consists of individuals who are knowledgeable and skilled in their academic disciplines, in pedagogy, and in a variety of other areas critical to educating and supporting students in a residential community (e.g., house counseling, advising, and leading co-curricular and extra-curricular activities). To attract and retain a diverse group of talented and energized newcomers to the teaching profession, the Academy must be at the forefront in the compensation and development opportunities it provides. To support and enhance the efforts of its distinguished complement of experienced teachers, the Academy must place a premium on life-long learning, as well as compensation. Just as on-going professional development is critical to facilitating full and effective faculty investment in the life of the school, so too is strong compensation critical to recognizing the faculty appropriately for this investment.

Implementation:

1. Maintain a leadership position in compensation and support a quality of life that reflects the value the Academy places on teaching as a profession. As a key benchmark, the Academy should aim to be at the top of the eight-school peer group in each age band.
2. Enhance recruitment and retention strategies to ensure the talent and diversity appropriate for achieving the Academy's mission.
3. Expect and support faculty members' participation in development opportunities that enable them to remain excellent as teachers in their disciplines. The department chairs should play a critical role in facilitating such professional development. (See point 5 below.)
4. Expect and support faculty members' participation in development opportunities that enable them to gain skills and enhance competence in multiple aspects of educating and supporting students in this community. The Deans of Faculty, Studies, Students, and Community and Multicultural Development should play a critical role in facilitating such professional development.
5. Review the role and workload of the department chairs in order to allow them to participate more fully in guiding professional development.
6. Identify the cost and raise the financial resources, both in endowment and operating funds, necessary to maintain a leadership position in compensation and to support faculty development initiatives.

OPERATIONAL GOALS

Phillips Academy is a complex organization. The ambitious strategic goal proposed in this plan requires that:

- the organization be well governed and managed and that its decision-making frameworks be clear;
- a strong professional and support staff be recruited, trained, and retained;
- communication among internal constituencies and with those outside the Academy be clear; and
- the financial management be sound in combination with significant fundraising.

The operational goals outlined here essentially provide a platform on which to develop and implement the plans required to achieve the strategic goal so central to the Academy's mission. We highlight these as operational rather than strategic to separate the mission-driven focus of our strategic recommendations from what we consider to be the most basic operating and management conditions required to address the strategic goal and its three interrelated components.

Operational Goal #1: To review institutional governance across all dimensions, with a particular focus on decision-making frameworks, to improve the understanding of process and the effectiveness of the various decision-making groups charged with leadership of the Academy.

Rationale: The Academy should assess the broad range of governance procedures in place for examining and reaching decisions on the complex issues facing the school. We acknowledge a perennial concern for effectiveness and inclusiveness in the decision-making process and recognize that the decisions that need to be made exist along a continuum. Some require a more centralized process, others require a broad consensus-driven process, and many fall in between. Our initial concern regarding decision making focused on the process in place for making decisions on education program requirements and how the Academy reaches decisions on what to keep, what to add, and what to eliminate. However, we feel a broader review of governance provides the foundation for a healthy dialogue around the issues facing the Academy.

Implementation:

1. Assess the effectiveness of the Board of Trustees, the Deans' Council, the Faculty Advisory Committee, Faculty Meeting, the Academic Council, the Administrative Council, and other groups charged with decision-making responsibility for the Academy. Focus on defining more sharply their purpose and procedures, recognizing that it is difficult, if not impossible, to define and anticipate all elements of decision making and that rigidity in this regard can be as unhelpful as a lack of clarity.

2. Assess current mechanisms and procedures for making decisions about the educational program.
3. Assess the ways in which decisions and the process by which they are reached are communicated within the community and with external constituencies.

Operational Goal #2: To attract and retain a talented and diverse staff committed to providing the services necessary to achieve the school's mission.

Rationale: To provide the support essential to educating a talented and diverse student body in a residential setting, we need a staff that is highly qualified, engaged, and energized. The staff constitutes the majority of the employees of Phillips Academy. Their skills and expertise are critical to the successful functioning of the school and are often necessary to lead the school in a new direction; therefore, they should be appropriately recognized and utilized.

Implementation:

1. Compensate staff members competitively in the various markets in which the Academy seeks support staff members -- i.e., local, regional, national, and professional.
2. Enhance opportunities to develop individual professional skills, to assure a talented staff, and to provide the basis for career advancement within the Academy when available.
3. Improve communication and promote interaction among staff, faculty, administration, and students so that staff receive feedback from the constituencies they serve, those constituencies receive feedback from the staff, and all groups work collaboratively both to address shared concerns and to advance toward achieving the Academy's mission.

Operational Goal #3: To engage the school community in establishing a communications plan for Andover, a private school with a public purpose.

Rationale: Andover needs to be proactive in communicating its mission and history as a private school with a public purpose. As Andover seeks to be a leader in secondary education, to have an impact on education more broadly through the models its curricular innovations and outreach programs provide, and to attract talented and diverse students, faculty, and staff, it should invest in a communications plan that articulates its mission and promotes its successes.

Implementation:

1. Engage Academy constituencies (trustees, administration, faculty, staff, students, parents, and alumni) in a discussion and reaffirmation of the core messages and values of the institution as a basis for the creation of a school-wide communications plan.

2. Conduct research to determine internal and external perceptions of the school with regard to core messages and values and the school's strengths and weaknesses compared to other educational options.
3. Establish a representative committee to develop an integrated communications program based on core messages and values, situational analysis research, and the goals of this strategic plan.
4. Educate students about the core messages and values of the school throughout their time at Andover.
5. Enhance communication of core messages and values to parents throughout the time their children are at Andover -- e.g., at admission, orientation, Parents' Weekend, end of term, grade transition, college application, and graduation.
6. Expand communication of core messages and values with alumni and past parents to enhance their connection with the school.
7. Actively communicate core messages and values with the external world (particularly the news media, feeder schools, and college admission offices) through a professional communications plan.

Operational Goal #4: To continue to seek a financial equilibrium marked by a distinguished educational program for youth from every quarter, a balanced annual operating budget, the preservation and enhancement of the purchasing power of the endowment, and the preservation and enhancement of the physical assets, including facilities, technology, and equipment.

Rationale: Financial equilibrium is necessary to sustain the resources required to underwrite the Academy's educational mission and program. Achieving this goal will require annual budgetary trade-offs, careful oversight of the endowment, and significant fundraising by the Academy.

Implementation:

1. Continue to use and improve a financial model to forecast the revenue and expense streams associated with particular policies so that Academy constituents can have the financial basis for determining how to balance competing priorities.
2. Support a strong annual and capital development program to provide annual gifts and long-term capital gifts for the endowment and the Academy's physical assets. Raising substantial new funding to support the Academy's strategic goals will require the active participation of the Board of Trustees, the administration and in particular the Head of School, the faculty, alumni, and parents.
3. Seek the most efficient source of capital -- e.g., the use of tax-exempt debt when markets are favorable and the strength of the Academy's finances permit such borrowing.
4. Plan to renew and replace the Academy's physical assets -- i.e., facilities, technology, and equipment -- at the level required to support the program and on the basis of their estimated useful lives. Initiate facilities planning in the summer of 2005 based on this strategic plan.