



COLLEGIATE

RISE ABOVE. GO BEYOND.

Building Upon Our Local Heritage
Charting Our Global Future



LOUISVILLE COLLEGIATE SCHOOL
STRATEGIC PLAN 2007-2012

DEAR COLLEGIATE COMMUNITY

Last January, Louisville Collegiate School initiated the development of a new, five-year strategic plan. Throughout the year-long process, the goal has been to identify and build upon the intersection of our school's mission and its market opportunity, to fully develop Collegiate's core competencies in a manner that advances the institution and differentiates it within a competitive school market.

At the outset of the planning process, Collegiate engaged the services of a respected planning facilitator, Ian Symmonds of Ian Symmonds and Associates (Portland, Oregon), to assist with our initiative. In order to ensure broad-based collaboration, a formal Steering Committee was created that included students, parents, alumni, administration, faculty and Board of Trustees members. Membership of the Steering Committee is shown on page 12.

Ian Symmonds and the Steering Committee conducted extensive research and analysis regarding Collegiate's enrollment, admissions, demographics, curriculum and factors unique to our current landscape. Surveys and interviews were initiated with all stakeholders including students, parents, alumni, administration, faculty and external community leaders. Through this process, the Steering Committee was able to identify a concise set of core institutional values and a Positioning Platform, through which all subsequent work was focused.

The twenty-six member Steering Committee embraced the newly defined Positioning Platform and moved forward to create the twelve subcommittees detailed below. A full roster of sub-committee members can be referenced on page 13.

- Academic Affairs/Curriculum
- Marketing/Communications/Positioning
- Finance
- Technology
- Institutional Advancement/External Relations
- Faculty Growth/Evaluation/Compensation
- Extra-curricular
- Student Life
- Community
- Facilities
- Governance
- Authoring

Armed with a relevant Positioning Platform, and guided by the Steering Committee, each subcommittee undertook a series of exercises aimed at identifying, quantifying and developing specific goals, initiatives and action steps related to the subcommittee's area of responsibility.

The result of this extensive, collaborative planning effort is a new five-year strategic plan for Louisville Collegiate School; a focused list of seven strategic goals, each supported by meaningful initiatives and specific action steps.

On behalf of the entire strategic planning team, we are pleased to present Louisville Collegiate School's five-year Strategic Plan.

Babs Rodes Robinson '80
President Board of Trustees

Scott Prince
Head of School

Barker Price
Chair, Strategic
Planning Committee

MISSION

Louisville Collegiate School prepares diverse students in a challenging and supportive environment to demonstrate outstanding academic preparation, extraordinary character, and confident leadership for a lifetime of global engagement and local responsiveness.

VISION

Louisville Collegiate School distinguishes itself as a preeminent college preparatory institution that instills its students with a lifetime commitment to learning, extraordinary character, and the confidence to excel in both global and local communities.

CORE PRINCIPLES

Louisville Collegiate School's core principles guide our community and its programs, initiatives, and distinctive culture:

- Commitment to achieve academic and personal excellence
 - Determination to fulfill individual potential
 - Creative and independent thought
 - Adaptability to change
 - Balance in development of mind, body and spirit
 - Respect for each individual
 - Support for each member of the school family
 - Celebration of differences
 - Self-discipline in all actions
 - Understanding of our global community
- Courage in the responsible exercise of freedoms
- Participation in civic life and community leadership



POSITIONING LOUISVILLE COLLEGIATE SCHOOL FOR THE FUTURE

Strategic planning is an exercise in finding the intersection between mission and market opportunity, differentiating the organization in a way that reflects core competencies, and organizing the institution around those opportunities. This planning process was developed by researching existing school strengths, the context of the environment in which it operates, and subsequently developing a framework or common “lens” to guide the balance of the planning process. This common lens is often called the Positioning Platform. Developed early in the strategic planning process, it guided the balance of the planning effort, ensuring that all stakeholders were operating from the same set of core ideas and concepts.

The following Positioning Platform identifies the ways in which Louisville Collegiate School will differentiate itself as a school, live out its mission and vision, and offer unique opportunities for all members of the school community.

POSITIONING PLATFORM: THE GLOBALLY ENGAGED AND LOCALLY RESPONSIVE INDEPENDENT SCHOOL

Louisville Collegiate School will be the educational leader in the Louisville community in issues of global engagement and local responsiveness through academic excellence, leadership development and a nurturing community. Through the completion of this strategic plan, we will prepare students to be leaders in the complex and globally interconnected world in which they will operate as adults.

A broadened global perspective and expanded connectedness to the local community will mark this strategic focus for our school. Our strengths in academic excellence, leadership development, and our nurturing community all provide the foundation for this new direction. We will prepare students to be engaged globally and involved locally with issues of importance and concern.

Throughout this strategic plan, we will outline seven strategic goals that will advance our mission, enhance our programs, and chart our future course. Each of these seven goals contains extensive plans derived from a collaborative and engaging planning process. During the next five years, Louisville Collegiate School commits itself to accomplishing this strategic plan.

THE PRIMARY GOALS OF OUR STRATEGIC PLAN

Building Upon Our Heritage/Charting Our Global Future is the Louisville Collegiate School Strategic Plan 2007–2012. This plan charts a bold course for the next five years for Collegiate utilizing our heritage as an outstanding city namesake independent school.

Our Positioning Platform for the future calls for greater focus on a global perspective in our academic, student life, and extra-curricular programs. Simultaneously, Collegiate will focus on the City of Louisville, connecting our mission through programs and services to the community and people around us. Finally, we will strengthen existing programs and operations at Collegiate in order to continue our maturity as an institution.

In order to accomplish our strategic objectives, our Strategic Planning Steering Committee, various sub-committees, and members of our community, have worked tirelessly to develop several areas of focus for our next five years. These areas have developed into primary goals of our strategic plan and carry with them action plans for accomplishing their objectives. The following are the seven primary goals that Louisville Collegiate School will focus on during this campaign.

Strategic Goal One:

Integrating Global Engagement into Our Academic Program

Strategic Goal Two:

Expanding Connectedness to Our Community

Strategic Goal Three:

Amplifying our Academic, Student Life, and Extra-curricular Programs

Strategic Goal Four:

Pursuing Optimal Enrollment

Strategic Goal Five:

Enhancing Institutional Advancement

Strategic Goal Six:

Implementing Master Planning Objectives

Strategic Goal Seven:

Strengthening Governance, Funding, Support, and Infrastructure

The balance of this document outlines the initiatives, action plans, and priorities we have established for each of these strategic goals.

The Specific Action Plans that are outlined below apply to the 2007–08 school year only. The Board of Trustees' Strategic Planning Committee has been tasked with evaluating the many other Action Plans that were identified and developed during the planning process for out-year consideration.



2007–2012 STRATEGIC GOALS

Strategic Goal One INTEGRATING GLOBAL ENGAGEMENT INTO OUR ACADEMIC PROGRAM

As we look to the future, Louisville Collegiate School will integrate global engagement into all of our programs and services, ensuring that our students will experience a school environment that becomes increasingly reflective of the complex and interdependent world in which we live. The following outlines our major academic initiatives to achieve our first goal, Integrating Global Engagement into Our Academic Program.

- I. Louisville College School will prepare students intellectually and academically for engagement in the global community of the 21st Century through the enhancement and expansion of our academic program.
- II. Louisville Collegiate School will provide experiential opportunities in order to reinforce classroom learning and connect the campus with the wider world of the 21st Century.
- III. Louisville Collegiate School will expand the student experience by integrating global engagement into our extra-curricular programs and services.



Strategic Goal Two

EXPANDING CONNECTEDNESS TO OUR COMMUNITY

Louisville Collegiate School, which enjoys a long heritage in our community, is an educational centerpiece in the City of Louisville. Our school will expand our connectedness to Louisville through programs and services that provide meaningful contributions and bring global engagement to our community. The following are the major initiatives of our second strategic goal, Expanding Connectedness to Our Community.

- I. Build reciprocal awareness between Louisville Collegiate School and the Louisville community.
- II. Build a greater appreciation and awareness of local history and culture into our programs.
- III. Involve the larger Louisville community in our international relationships.



Strategic Goal Three

AMPLIFYING OUR ACADEMIC, STUDENT LIFE, AND EXTRA-CURRICULAR PROGRAMS

As an institution with nearly a century of heritage, Louisville Collegiate School has historically expanded and improved its academic, student life, and extra-curricular offerings to meet evolving societal needs. Collegiate will enhance and expand its existing academic, student life, and extra-curricular offerings through the faculty we hire, the support we offer, and the culture and climate we foster. The following are the primary initiatives from our third strategic goal, Strengthening our Academic, Student Life, and Extra-curricular Programs.

- I. Invest in high quality faculty and staff who support and advance the mission of our institution.
- II. Broaden the global focus within our comprehensive college preparatory program.
- III. Nurture strong relationships across ages and divisions within our Junior Kindergarten (JK) to 12th-grade community.
- IV. Expand our technology program in order to support growing academic needs and integrate technology into all areas of our institution.
- V. Enhance student life and extra-curricular programs to reflect the mission and values of the Strategic Plan.



Strategic Goal Four PURSUING OPTIMAL ENROLLMENT

During the next five years, Louisville Collegiate School will focus on executing an enrollment management plan that outlines an ideal school enrollment. We will strengthen our promotional efforts and community connectivity in order to grow demand, visibility for our programs, and relevance for our services. The following are the major initiatives for our fourth strategic goal, Pursuing Optimal Enrollment.

- I. Implement an enrollment management philosophy that utilizes an integrated and data-driven approach throughout admissions, financial aid, student retention, and institutional research to meet enrollment and revenue goals.
- II. Expand visibility in the local community in order to increase demand, enrollment, and financial support.
- III. Develop the Louisville Collegiate School brand to communicate the new strategic positioning.



Strategic Goal Five

ENHANCING INSTITUTIONAL ADVANCEMENT

Over the next five years Louisville Collegiate School will develop an integrated approach to the external relations functions of our institution. We will work to unify the efforts of admissions, financial aid, development, public relations, and marketing in order to extend our visibility and speak with clarity about our mission and vision. The following are the primary initiatives to our fifth goal, Enhancing Institutional Advancement.

- I. Develop an integrated institutional advancement function that supports collaborative efforts between enrollment management, marketing, communications, public relations and development.
- II. Prepare an internal and external communication plan that reflects the mission of the school and is consistent across all constituencies.
- III. Create a fundraising plan to support the immediate and long term financial needs of the school.
- IV. Grow alumni engagement and participation with Louisville Collegiate School.
- V. Continue to promote our successes in the local community.
- VI. Market our unique global initiatives.



Strategic Goal Six

IMPLEMENTING MASTER PLANNING OBJECTIVES

Campus facilities are important to providing the necessary educational and extra-curricular environment to fulfill the mission of the school. During the next five years, Louisville Collegiate School will examine and develop a campus master plan and acquisition plan. The following are the primary initiatives of our sixth goal, Implementing Master Planning Objectives.

- I. Develop a Master Plan for facilities development.
- II. Develop a Master Acquisition Plan.





Strategic Goal Seven

STRENGTHENING GOVERNANCE, FUNDING, SUPPORT, AND INFRASTRUCTURE

During the next five years, we seek to advance the Strategic Plan by ensuring adequate funding of our strategic goals and following established best practices in school governance, finance, personnel, and operations. The following are the major initiatives for our seventh strategic goal, Strengthening Governance, Funding, Support, and Infrastructure.

- I. Focus on our Strategic Plan goals and initiatives.
- II. Ensure a nominating process for all levels of Board service that is inclusive, open, and in support of our new mission and positioning.
- III. Review bylaws for relevancy.
- IV. Establish a comprehensive and ongoing Trustee and Board evaluation process.
- V. Ensure that all committees function to their highest potential to optimize success of the new Strategic Plan.
- VI. Provide professional development and training opportunities for the Board of Trustees.
- VII. Create a long-term financial plan aligned with the Strategic Plan.
- VIII. Develop a long-term capital plan aligned with the Strategic Plan.

STRATEGIC PLANNING STEERING COMMITTEE

Peter Behr
Chair, Science Department

Cindy Brundige
Upper School History

Caroline Seay Borgman '77
Alumni, Former Trustee

Ceci Conway Boden '85
*Alumni, Former Trustee, Chair
Committee on Trustees*

Stephanie Disney
*Associate Director of
Development and Communications*

Merrell Wall Grant '74
Alumni, Trustee, Executive Committee

Sarah Harlan
*Former Trustee, President
Parents Association*

Jennifer Hartlage
Director of Development

Tom Hobert
Former Head of School

Sharon Kinnison
Chair, Fine Arts Department

Aaron James
Former Director of Admissions

Christine Johnson
Trustee

Rashad Masri
Student

Maureen McGowan
Chief Financial Officer

Janice Mulligan
Middle School Math and Science

Keira Murphy
Head of Middle School

Barker Price
Trustee, Chair Strategic Planning Committee

Scott Prince
Head of School

Jane Pullicino
Head of School Administrative Assistant

Stephen Reily
Trustee

Allison Rollins
Student

Jo Ann Rooney
Former Trustee

Leslie Scherer
Lower School, Grade 5

Claudette Taylor
Former Head of Lower School

Tim Williams
Director of Athletics

Phoebe Wood
Former President Board of Trustee

STRATEGIC PLANNING SUB-COMMITTEES AND CHAIRS

Academic Affairs/ Curriculum:

Scott Prince, Chair
Garth Beache
Peter Behr
Ann Bowling
Darcy Maloney
Frankie Moore
Janice Mulligan
Mary Severtson
Cindy Skarbek

Student Life:

Keira Murphy, Chair
Brad Davies
Marybelle Estman
Carey Goldstein
Pamela Lang
Allison Rollins
Leslie Scherer

Faculty Growth/Evaluation:

Claudette Taylor, Chair
Wendy Martin
Maureen McGowan
Jane Pullicino
Debby Scherer
Thomas Travis

Technology:

Stephanie Disney, Chair
Joe Casalvieri
Patsy Cohen
Katie Herman
Maureen McGowan
Peter Van Leusen

Governance:

Ceci Conway Boden, Chair
Barker Price

Facilities:

Barker Price, Chair
Mike Basham
Maureen McGowan
Bashar Masri
Susan Maxwell
Louise Wall

Institutional Advancement/ External Relations:

Jennifer Hartlage, Co-Chair
Aaron James, Co-Chair
William Blackford
Amy Cory
Leslie Geoghegan
Andrew Kupersmith
Cindy Skarbek
Bill Street

Marketing/Communications/ Positioning:

Merrell Grant, Chair
Ceci Boden
Elizabeth Bruenderman
Stephanie Disney
Debbie Galloway
Mike Harlan
Jennifer Hartlage
Aaron James
Suzanne Oldham
Terry Sebastian

Finance:

Stephen Reily, Chair
Jim Allen
David Deno
Erin Fry
Leslie Geoghegan
Jean Grawemeyer
Tom Hobert
Maureen McGowan

Extra-curricular:

Sharon Kinnison, Co-Chair
Tim Williams, Co-Chair
Brad Davies
Susan Harrison
Kevin Jackson
Pamela Lang
Ed Skarbek
Damian Vitale

Community:

Sarah Harlan, Chair
Rick Haas
Pat McCulloch
Carol Pye
Allison Rollins
Robin Seiler

Authoring:

Tom Hobert, Co-Chair
Barker Price, Co-Chair
Marti Calderwood



The Louisville Collegiate School Strategic Plan was approved and adopted by the Collegiate Board of Trustees November 14, 2007.

LOUISVILLE COLLEGIATE SCHOOL
2427 GLENMARY AVENUE
LOUISVILLE, KY 40204

(502) 479-0340 • WWW.LOUCOL.COM