



STRATEGIC PLAN 2009-2012

TABS



WE ARE PLEASED to present The Association of Boarding Schools' *Strategic Plan 2009-2012*, with thanks to our Board and other strategic planning participants. The plan is bold in reach and broad in scope—appropriate to the remarkable heritage, and even more remarkable future, of our schools. The job of TABS is to help support and advance boarding schools, and by extension, the students and families they serve. This Strategic Plan is designed to give practical shape to that dream. Here, we set forth the goals, strategies, and working tactics developed over several months of purposeful, imaginative, and rigorous planning. The dreaming and planning are never finished, of course, but now it is time to execute. It is our honor and privilege to accept that charge on behalf of all TABS schools.

Sincerely,
F. Robertson Hershey
Headmaster, Episcopal High School (VA)
TABS Board Chair

Peter W. Upham
TABS Executive Director

TABS STRATEGIC PLAN STEERING COMMITTEE

F. Robertson Hershey (Chair), Headmaster, Episcopal High School VA
Susan Nelson (Vice-Chair), Head of Schools, The Webb Schools CA
John Boland III, Asst Head for Finance & Operations, Rabun Gap-Nacoochee School GA
Drew Casertano, Headmaster, Millbrook School NY
Doug Dickson, Head of Upper School, St. Stephen's Episcopal School TX
Burch Ford, Retired Head of School, Miss Porter's School CT
Jo-Anne Kingstone, Deputy Head of School, Shawnigan Lake School BC
Robert H. Mattoon, Jr., Executive Director, Eight Schools Association CT
Rick Schubart, Bates-Russell Distinguished Faculty Professor, Phillips Exeter Academy NH
Peter W. Upham, Executive Director, TABS
Louisa Zendt, Director of Admission, St. Andrew's School DE

MISSION & VISION

The Association of Boarding Schools serves college preparatory boarding schools in the United States and around the globe. The Association leads a domestic and international effort to promote awareness and understanding of boarding schools and to expand the applicant pool for member institutions. TABS is the one-stop, indispensable resource for educators seeking training, research, guidance, and support on all issues pertaining to the residential school experience. TABS is the voice for independent boarding schools, their historical contribution to our world, and the current and compelling benefits of living and learning in an academic community.

www.TABS.org

OUR 5 GOALS



MARKETING

To promote boarding schools as the premium choice for those seeking outstanding preparation for college and for life, to enlarge the boarding school applicant pool, and to advance the leadership role of TABS in the world of education.

PROFESSIONAL DEVELOPMENT

To provide member school leaders and educators dynamic professional development opportunities tailored to the unique character of their work and lives in boarding school.

THOUGHT LEADERSHIP

To provide philosophical and strategic leadership for boarding schools and their educators by articulating the shared goals for which they strive, initiating conversations about the ideals that inform their work, and providing the data to monitor their environment and measure their progress.

MEMBERSHIP

To serve the broadest membership possible, nationally and internationally, of schools, organizations, and individuals committed to the TABS mission of serving college preparatory boarding schools.

FINANCE

To ensure the financial resources and expertise to fund the TABS mission, harmonizing current programs with new initiatives, while building a sound balance sheet capable of supporting the organization, its programs, and its membership in perpetuity.



MARKETING GOAL



To promote boarding schools as the premium choice for those seeking outstanding preparation for college and for life, to enlarge the boarding school applicant pool, and to advance the leadership role of TABS in the world of education.

PUBLIC STRATEGIES

ONE Promote the benefits of boarding schools by communicating our core messages frequently and consistently to our audiences. These messages are:

UNPARALLELED ACADEMICS Small classes, dedicated teacher-mentors, and multiple points of contact throughout the day make for superior learning opportunities.

ENVIRONMENTS THAT WORK School cultures built around trust, honesty, and respect, in safe and beautiful settings, lead students to try new things, take thoughtful risks, build confidence, and form enduring friendships.

THE GIFT OF INDEPENDENCE Living with others in community and managing significant academic and personal responsibilities, students gain an independence and maturity unduplicated in other school settings.

LIVES OF SUCCESS AND SERVICE Graduates attend the finest universities and succeed once there. Relative to peers in other schools, they attend graduate schools at higher rates, advance more quickly in their careers, and are more involved and more philanthropic in their communities.

TWO Build awareness of and interest in boarding schools by establishing two-way relationships via web marketing.

THREE Deliver an engaging tone of voice by communicating in personal terms, sharing real stories, and appealing to emotions.

WORKING TACTICS

- A** Recreate and launch our public website at boardingschools.com.
- B** Implement a program to drive prospective families to the new site.
- C** Create a "Virtual Fair" page to host electronic boarding school events for families.
- D** Establish a summer programs website.
- E** Construct a family database to allow us to follow-up and stay connected with website visitors / inquiries.
- F** Establish and cultivate a database of referral sources, feeder schools, and educational influencers.
- G** Develop and execute a Public Relations plan.



MARKETING (CONTINUED)



MEMBER STRATEGIES



ONE Apply a consistent look and feel to all membership communications.

TWO Initiate a systematic communications program to build awareness of TABS purpose, offerings, and benefits; to attract new members; and to retain existing members.

THREE Build and deliver distinctive, valuable TABS programs and events.

WORKING TACTICS

- A** Recreate and launch our member website at tabs.org.
- B** Publish a periodic member newsletter.
- C** Offer boarding school newsfeeds.
- D** Set up forums for information sharing among the membership.
- E** Integrate membership database with program/service and accounting databases to provide a richer online platform for TABS to communicate and for members to pay their bills, track their participation, and understand the services, savings, and value they receive through TABS.
- F** Through our programs, publications, and resources, enhance the marketing know-how within the boarding school realm and provide real tools for member schools to use in their own marketing efforts.

Marketing Task Force Members

Drew Casertano (Chair), Headmaster, Millbrook School NY
Michael Gary, Director of Admission, Phillips Exeter Academy NH
Louisa Zendt, Director of Admission, St. Andrew's School DE
F. Robertson Hershey (Ex-Officio), Headmaster, Episcopal High School VA
Susan Nelson (Ex-Officio), Head of Schools, The Webb Schools CA
Peter W. Upham (Ex-Officio), Executive Director, TABS

PROFESSIONAL DEVELOPMENT GOAL



To provide member school leaders and educators dynamic professional development opportunities tailored to the unique character of their work and lives in boarding school.

STRATEGIES

ONE Enhance our commitment to our three core audiences: Heads, Admission professionals, and Residential Life staff.

TWO Identify and begin to cultivate other priority audiences, based on level of interest/need and a review of the competitive landscape.

THREE Serve all boarding school administrators through a base level of programming and service.

FOUR Through research, innovation, and experimentation, find the most effective and efficient model for each program.

WORKING TACTICS

A Develop programming that speaks to the needs of both enrollment and residential life professionals along the full spectrum of experience.

B Develop an advisory committee of Admission Directors to help TABS identify a clear strategic focus and most promising new professional development directions.

C Establish/create a customized set of programs and services for Heads of School only.

WORKING TACTIC

A Direct first efforts at researching and serving the following segments: Board Chairs, Assistant/Associate Heads, Athletic Directors, Health Services/Counseling staff, College Office Administrators, Summer/Auxiliary Program Leaders, Marketing/Communications professionals, Technology (IT) Coordinators, and boarding school newcomers.

WORKING TACTICS

A Encourage administrators to connect with TABS and to network and learn from one another through the use of broad-gauge tools like the Annual Conference and the website.

B Design curriculum to address the particular character of life and career transitions for boarding school administrators, as well as their ongoing need to integrate and balance their professional and personal lives.

WORKING TACTICS

A Seek to explore, pilot, and assess various approaches and platforms in content sourcing, development, and delivery, as well as program staffing.

B Pursue partnerships, alliances, and joint ventures that deliver value to members by advancing the excellence, appropriateness, and range of our offerings.



Professional Development Task Force Members

Jo-Anne Kingstone (Chair), Deputy Head of School, Shawnigan Lake School BC
Dr. Dennis Campbell, Headmaster, Woodberry Forest School VA
Doug Dickson, Head of Upper School, St. Stephen's Episcopal School TX
Jeremy LaCasse, Head of Senior School, Shady Side Academy PA
F. Robertson Hershey (Ex-Officio), Headmaster, Episcopal High School VA
Susan Nelson (Ex-Officio), Head of Schools, The Webb Schools CA
Peter W. Upham (Ex-Officio), Executive Director, TABS



THOUGHT LEADERSHIP GOAL

To provide philosophical and strategic leadership for boarding schools and their educators by articulating the shared goals for which they strive, initiating conversations about the ideals that inform their work, and providing the data to monitor their environment and measure their progress.

STRATEGIES

ONE Develop and execute a research agenda that helps support both the Professional Development and Marketing dimensions of the TABS Mission & Vision.

TWO Through a range of forums, connect our members with one another, with experts in other relevant domains, and with the TABS leadership to foster lively and productive engagement with the issues facing boarding schools and boarding school professionals.

THREE Spearhead the effort to study, discuss, and rethink boarding school financial paradigms.

FOUR Position our member schools within the worldwide history and community of boarding schools, identifying shared traditions and encouraging cross-cultural understanding of differences.



WORKING TACTICS

A Carry out significant research projects to test, refine, and enlarge our understanding of the distinct value of the boarding school experience.

B Install an annual process for identifying, collecting, and publishing boarding school metrics for members, to include a thoughtful mix of key operational and market data.

C Conduct periodic membership surveys and disseminate results to members in order to discover and address new and emerging industry issues.

WORKING TACTICS

A Recruit and circulate articles and op-ed's by boarding school leaders and by experts in relevant domains.

B Generate periodic letters and communications from the Executive Director addressing philosophical and strategic questions.

C Publish occasional white papers, monographs, and reports on selected topics.

D Establish and maintain online forums for members to share, pose questions, offer ideas, and discuss their work.

E Develop a "Best Practice" resource file by and for members.

F Explore the viability of assembling a volunteer network of retired Heads and other experienced professionals willing to consult with member schools on leadership, strategy, and administration.

G Deepen the archive of historical information about boarding schools.

WORKING TACTICS

A Create new tools, training, products, and services to help individual schools develop or enhance viable financial and operating models.

WORKING TACTICS

A Develop resources for members on global trends, news, markets, and laws.

B Cultivate relationships with international boarding school networks and sister associations.

C In established and promising foreign markets, continue to organize member school admission fairs and other high-value marketing enterprises.

Thought Leadership Task Force Members

Robert H. Mattoon, Jr. (Chair), Executive Director, Eight Schools Association CT

Eric Peterson, Head of School, St. George's School RI

Rick Schubart, Bates-Russell Distinguished Faculty Professor, Phillips Exeter Academy NH

F. Robertson Hershey (Ex-Officio), Headmaster, Episcopal High School VA

Susan Nelson (Ex-Officio), Head of Schools, The Webb Schools CA

Peter W. Upham (Ex-Officio), Executive Director, TABS

MEMBERSHIP GOAL



To serve the broadest membership possible, nationally and internationally, of schools, organizations, and individuals committed to the TABS mission of serving college preparatory boarding schools.

STRATEGIES

ONE Attend to evolving current membership interests and needs to maximize membership appeal and retention.

TWO Expand and refine the categories, criteria, and approval process for TABS membership.

THREE Market TABS energetically within our current sphere of influence and in areas and markets beyond our familiar ones.

WORKING TACTICS

A Survey membership at regular intervals to ensure satisfaction with TABS benefits, programs, and services.

B Modify, as necessary, based on findings.

WORKING TACTIC

A Develop and market parameters for a TABS Provisional Membership and a TABS Associate Membership classification, along with the existing Full Membership opportunity. The criteria for Full Membership are:

- Schools must have an operating residential life program with adult-staffed dormitory facilities.
- Schools must be independent, nonprofit, tax exempt organizations.
- Schools must be accredited by an evaluating agency recognized by TABS.
- Schools must be nondiscriminatory under the law in admission and employment practices.
- Schools must be, by mission and by practice, college-preparatory.

WORKING TACTICS

A Research and identify appropriate national and international schools, institutions, and individuals underserved by local or regional consortia, agencies, or associations.

B Create a communications program, tailored to each existing and potential membership audience, highlighting the mission of TABS and the benefits of its membership (full, provisional, associate), programs, and services.



Membership Task Force Members

Burch Ford (Chair), Retired Head of School, Miss Porter's School CT
Dr. Henry (Skip) Flanagan, Jr., Retired Headmaster, Western Reserve Academy OH
Mary Louise Leipheimer, Head of School, Foxcroft School VA
Kimberly C. Loughlin, Director of Admission, Bement School MA
Michael Mulligan, Head of School, The Thacher School CA
F. Robertson Hershey (Ex-Officio), Headmaster, Episcopal High School VA
Susan Nelson (Ex-Officio), Head of Schools, The Webb Schools CA
Peter W. Upham (Ex-Officio), Executive Director, TABS



FINANCE GOAL

To ensure the financial resources and expertise to fund the TABS mission, harmonizing current programs with new initiatives, while building a sound balance sheet capable of supporting the organization, its programs, and its membership in perpetuity.

STRATEGIES

ONE Consistent with the organization's growing size, complexity, and resources, continue to sharpen the effectiveness of TABS' financial management.

TWO Reexamine scope of offerings and optimize pricing.

THREE Identify and cultivate new and emerging revenue streams.

WORKING TACTICS

A To enable flexible planning and what-if analysis, develop and use a comprehensive and dynamic budget model for the association, with clear delineation between operating and capital dimensions.

B More fully define the necessary financial competencies and give proper attention to these in Board selection, organizational design, staffing, and outsourcing decisions.

C Review, modify, and formalize the organization's investment policy, in line with strategic objectives and prudent stewardship.

D Conduct an audit of TABS' staff compensation and benefits program to ensure that the organization is able to efficiently attract and retain outstanding people to support our exceptional schools.

WORKING TACTICS

A Conduct a strategic review and full accounting of existing programs to test for sustainability.

B Assess dues structure, as well as program pricing, in light of strategic intent, competitive considerations, and fairness across the membership.

C Consider loyalty, frequency, and bundling discounts for members.

WORKING TACTICS

A Ramp up the corporate sponsorship program, with a goal of underwriting 20%-25% of costs for every key professional offering.

B Design, promote, and administer a compelling set of elective, premium marketing opportunities and services, enabling members to piggyback on TABS' new outreach initiatives.

Finance Task Force Members

John Boland III (Chair), Asst Head for Finance & Operations, Rabun Gap-Nacoochee School GA

John Eidam, Dean of Admission, Wyoming Seminary PA

Kathleen A. Hanson, Senior Consultant, Marts & Lundy TN

F. Robertson Hershey (Ex-Officio), Headmaster, Episcopal High School VA

Susan Nelson (Ex-Officio), Head of Schools, The Webb Schools CA

Peter W. Upham (Ex-Officio), Executive Director, TABS



The Association of Boarding Schools  WWW.TABS.ORG

