

Multi-Year Plan Components

For those schools wishing to create or update plans for inclusion in the self-study or as they create the Multi-Year Plan, the following guidelines are provided.

All plans should be incorporated into and coordinated with the school's Multi-Year Plan which is meant to be all-inclusive and should include financial implications, person(s) responsible, and timelines for all component plans. The number of years the plan covers will vary from school to school; a reasonable minimum would be three years and a reasonable maximum might be ten years.

All plans should be based on the mission of the school, together with the various purposes, objectives, and goals of the various components of the school's programs.

Not all schools will be able to or will choose to develop all of these plans. As a school develops its Multi-Year Plan after it has received any recommendations that have come out of the self-study or the visiting committee, having these plans in place, or at least begun, will be a significant benefit to the school.

1. Enrollment

Based on the agreed-upon grade range, the school should provide an enrollment projection for at least the next 5 years; components of this projection should include: grade level, gender, and where appropriate, separate numbers for students who will qualify for financial aid, children of employees who may receive tuition remission, and students who may be involved in special programs. All enrollment data should be aligned with projected tuition and fee levels over time in order to show projected net income from this area. Desired levels of financial aid should be included in this plan.

If enrollments are expected to change, either to increase or decline, the school should be able to adjust staffing, facilities, curriculum and other program components; these changes, driven by enrollment fluctuations, should inform the components of other plans.

2. Curriculum

Based on the mission, grade levels, and enrollment of the school, what should the curriculum contain? In order to have students learn what is expected of them, what courses, staffing, facilities, time, technology, and materials are required?

A curriculum plan should outline the general course and program descriptions for the desired curriculum, even if some courses or programs are not being offered at the time that the plan is created. As the needs for the curriculum over time are determined, some aspects of other plans may be affected.

3. Academic Technology

This plan only relates to the program of the school, not the administrative or institutional uses of technology. This plan should be developed by teachers and the academic leadership, and should cover the integration of technology into the various components of the program, determine the necessary skill levels of students and teachers to reach the desired utilization, and should project the hardware, software, infrastructure, maintenance, and management aspects of technology. All the goals and information derived from the Academic Technology Plan should be incorporated in the Overall Technology Plan.

4. Library

Depending on the type and scope of the school's library or media center, this plan should outline the purposes, objectives, and goals of this resource, including the needs for staff, facilities, related technology, print materials and periodicals, and curriculum. The Library Plan might include a specific curriculum for teaching library use skills, including research, cataloging systems, and procedural familiarization.

A plan for library technology should be included here, and is separate from the Academic Technology plan mentioned elsewhere; there may obviously be some overlap, but the school should avoid the temptation to combine library and technology into one area as there are often very different uses for technology across the entire school curriculum.

5. Diversity

The school's efforts to support difference and multiculturalism might best be described in the form of a plan to identify the specific needs of various students. Several components of such a plan might include providing for: special or augmented programs for certain students or groups, the education of students about issues of equity and justice, providing for the professional development of faculty, including various relevant topics in the general curriculum, and continuing to keep all constituencies aware of the complexities of how differing cultural and learning backgrounds affect the school's environment and its ability to meet its mission.

6. Institutional Technology

While the Academic Technology and Library plans are specific to those areas (with some overlap), the institutional Technology plan pulls these separate plans together, and combines it with any other specific-use plans. The institutional Plan provides for the appropriate services and systems to integrate technology into the curriculum and also support the coordination of academic, administrative, and institutional functions. This is where a school would plan for the future development or changes to a network; also, the staffing, financing, and construction of all network and infrastructure components would be included in this plan.

7. Facilities

Given the mission and corresponding program at the school, do the facilities meet the needs of that program? A Facilities Plan might involve an audit of the current facilities including their history, use, age, condition, and future needs in term of expansion, renovation, or maintenance. Any additional, new facilities might be planned using this background information.

8. Financial

All of the plans described herein will have financial ramifications and this is the place to bring all that information together. Financial plans and projected cash flows should be updated periodically so as to avoid surprises when unforeseen enrollment shifts take place. The Financial Plan also helps determine what the short- and long-term Development needs are so that planning can be accomplished in that area as well. Policies regarding depreciation, endowment, financial aid, salaries, and benefits should be considered here.

9. Development

As the general needs of the school, especially in financial terms, are developed through careful consideration of program needs and fulfilling the mission of the school, development or fund-raising considerations come into play. If the school has needs outside of tuition and fee income, rental or other ancillary income, or borrowings, a need may arise to develop individual or corporate donors. In doing a Development Plan, the school should consider budgetary considerations including staff, office space, and travel as appropriate. Feasibility studies, donor research, cultivation activities, and social events can and should be part of this planning process.