



# **Sample Foundation Visit Reports**

## **Alcott Academy & Hawthorne Academy**

**Note:** *The following sample Foundation Visiting Committee Reports for Foundation Standard 1 are provided as illustrations and are not intended as models that other schools must follow.*

*September 2020*

# Alcott Academy

## Foundation Standard 1: Enrolled Students Align Appropriately with the Mission

- 1.a. The admissions process aligns with the mission and values of the school.
- 1.b. The school identifies and addresses current enrollment trends and challenges.
- 1.c. The school articulates its “value proposition” in light of enrollment, mission and societal trends.
- 1.d. If applicable, the school understands and addresses boarding/homestay trends.
- 1.e. The school’s aspirations and plans to strengthen any element of enrollment.

SM1:	Standard Met: evidences clear understanding, effective implementation and thorough planning for further improvement.
SM2:	Standard Met: evidences understanding, evolving implementation and planning for improvement.
SU1:	Standard Unmet: evidences inadequate understanding, implementation and planning for remediation that may foreseeably compromise student experience.
SU2:	Standard Unmet: lacks understanding, implementation and planning for remediation, thereby compromising student experience.

**School’s Rating:** SM1

**Foundation Visiting Committee’s Rating:** SM1

### Explanation of Rating

Alcott Academy is clearly analyzing future demographic trends in Burlington and its surrounding communities with the possibility that enrollment, and subsequently finances, may be a challenge in the not too distant future. School administrators are aggressively monitoring enrollment trends so they will be well-positioned to maintain enrollment, keep tuition reasonable, and remain sustainable.

### Foundation Visit Summary of Observations and Conclusions

Alcott Academy is presently at full enrollment with waiting lists for the upcoming school year. The school’s mission, “Search for Knowledge, Build Community and Encourage Creativity,” is prominently displayed in all publications, in classrooms, and on the school website. In conversation with current parents, the Foundation Visiting Committee heard that the school’s mission and values are clearly communicated during the admissions process. Prospective parents are encouraged to think about the school’s mission and be sure that this is the type of school that they desire for their child(ren).

Admission to Alcott Academy is open to qualified students of any race, color, gender, ethnicity, national origin, or disability (if reasonable accommodations can be assumed by the school). Alcott Academy defines the range and type of students suitable for admission by identifying students whose needs can be met by its programs and staff. This is accomplished by interviewing prospective families, requiring a shadow day for prospective students, and soliciting teacher/staff input. When interviewed, teachers unanimously agreed that they had a significant role in admissions decisions and that their input was valued. All previous school records and present health and immunizations records are required before an admission decision is made.

While there is presently a waiting list, the Academy is very aware of the changing demographics in the surrounding communities. The Admissions Director provided the Foundation Visiting Committee copies of the data gathered and shared with the senior administrative team and the Board of Trustees. This downward trend in the student age population is coupled with a new public elementary school being built in Burlington itself.

The Academy’s first step in addressing this critical issue was to convene the board, faculty and committed parents to flesh out the Academy’s value to the families and students, noting that it is not just an educational value but a social

and emotional value as well. The goal is to communicate to the broader community what makes Alcott Academy unique, exceptional and, most importantly, how the Academy will meet the needs, interests and goals of the students and their families. Once this is accomplished, an aggressive communication plan will be established and implemented. Oversight of the drafting and implementation of this plan has been delegated to the Admissions Director.

In addition to fleshing out and communicating the value proposition, the Board, and in particular the Finance Committee, must consider alternative revenue sources to fund the increasing requests for financial aid. The Board indicated to the Foundation Visiting Committee that they are mindful of the rising cost of tuition and the ability of families to pay the tuition.

Although enrollment management is a strength for Alcott Academy, the Foundation Visiting Committee recommends defining and clearly communicating the school's mission and value proposition to the broader community. In addition, the Academy needs to be mindful of pricing themselves out of the local market.

**Commendation:**

The Foundation Visiting Committee commends Alcott Academy for its proactive strategies to address the changing demographics.

**Recommendation:**

The Foundation Visiting Committee endorses Alcott Academy's own recommendation *to better clarify its value proposition in order to maintain enrollment.*

# Hawthorne Academy

## Foundation Standard 1: Enrolled Students Align Appropriately with the Mission

- 1.a. The admissions process aligns with the mission and values of the school.
- 1.b. The school identifies and addresses current enrollment trends and challenges.
- 1.c. The school articulates its “value proposition” in light of enrollment, mission and societal trends.
- 1.d. If applicable, the school understands and addresses boarding/homestay trends.
- 1.e. The school’s aspirations and plans to strengthen any element of enrollment

SM1: Standard Met: evidences clear understanding, effective implementation and thorough planning for further improvement.

SM2: Standard Met: evidences understanding, evolving implementation and planning for improvement.

SU1: Standard Unmet: evidences inadequate understanding, implementation and planning for remediation that may foreseeably compromise student experience.

SU2: Standard Unmet: lacks understanding, implementation and planning for remediation, thereby compromising student experience.

**School’s Rating:** SM1

**Foundation Visiting Committee’s Rating:** SM2

### Explanation of Rating

The Foundation Visiting Committee actually flirted with changing the rating to SU1 but settled on SM2. What is so interesting about Hawthorne Academy is how subtle the distinction is between operating comfortably and operating under significant stress. Up to the recent past, Hawthorne Academy was a model small boarding school. It had a strong brand rooted in New England values. It had signature programs which any school would welcome. And then they were no longer unique. Several schools moved into the niches previously enjoyed by Hawthorne Academy. Differentiating became increasingly difficult with the most notable differentiator being scholarship dollars. And then it all becomes unaffordable. The Foundation Visiting Committee ultimately came to conclude that previous successes of Hawthorne Academy were clouding the new horizon. What worked in the past would not necessarily work going forward.

### Foundation Visit Summary of Observations and Conclusions

At first blush, it seems as if the Hawthorne Academy community has a mission which pervades all that they do - from the enrollment process through to graduation. If one considers the indicators listed above, Hawthorne Academy seems actively committed to each. This is apparent in the Self-Study Report. It was also evident in each of the interviews the Foundation Visiting Committee held with the extremely well spoken and veteran key players in admissions and enrollment management. The Foundation Visiting Committee found this as well in conversations with those responsible for marketing and communications at Hawthorne Academy – including the two trustees on the Board’s Marketing Sub Committee.

The same consistency of messaging is apparent in the Hawthorne Academy’s online presence. The website is informative, and easy to navigate. The push pages generated by the school for a variety of constituencies are well written, focused and even “catchy”. Hawthorne Academy has extensively surveyed its major constituencies. The relevant conclusions drawn from parent and current student surveys would indicate a high level of approval for the quality of the Hawthorne Academy experience. Students recently enrolled as college students were equally enthusiastic. Hawthorne Academy was delivering on its promise.

The initial instinct of the Foundation Visiting Committee was to give Hawthorne Academy a rating of SM1, and then move on to aspects of the school warranting a more concerted look. It was at a scheduled lunch with a small group of faculty that there appeared to be what one could simply call a “kink in the armor”. The gist of their remarks, by the way, was nowhere to be seen in the Self Study Report. The conversation during the lunch, and at a brief follow-up meeting with the Interim Head of School implied that the mission of the school and the delivery of its promise were likely no longer in the best interests of Hawthorne Academy. It was out of touch.

Essentially, all that is noted above is correct and has served the school well. The Hawthorne Academy team understands and believes that it is delivering on the Standard and the five indicators. Effectively however, said the faculty at the lunch, the strategic language is not as compelling as it should be in this increasingly challenging small New England boarding school world.

The meeting with the interim head of school was particularly informative on many levels. Mindful that her charge was to “peacefully” shepherd the school through the transition from the abruptly retired Head of six years and the appointment of the new Head several months from this Visit, she and the Board made the decision to leave all strategic language discussion to the new Head once appointed. The focus would be on the needs of the faculty. Therefore, the message for the moment was to keep doing what you have been doing. The sense was that it was working well – even if unknowingly the world was slowly and quietly passing them by. It was now apparent that evaluating how well the school “walked it’s talk” was put on hold. Why this was not flagged as worth noting – the mission statement for Hawthorne Academy, while reviewed annually, has remained virtually unchanged for 20 years.

It was then in a conversation with the CFO that a hint of a challenging trend emerged. The currently enrolled students are wonderful, talented and mission appropriate. All agree. It seems that the admissions numbers are stable since the total enrollment figures have not changed much over the past few years. Looking more closely, it was discovered that there were several significant unrestricted one-time, non-repeatable bequests from friends of the school which allowed Hawthorne Academy to enroll some terrific ninth and tenth graders with no provision built in to sustain their level of funding in the years to come. It was here where the issue lay. The way that Hawthorne Academy was hitting its numbers was by spending more money rather than sharpening its “value proposition”. Without attention, Hawthorne Academy could simply run out of money. An exhausted faculty were feeling this financial pinch as there had been some recent layoffs/early retirements.

### **Commendations:**

The Foundation Visiting Committee commends Hawthorne Academy for:

1. Developing an outstanding enrollment management program which has served the Academy well to date.
2. The remarkably high levels of satisfaction noted in the survey results of parents and students alike.
3. The efforts of the transition team to clear the runway for the new Head to take off.

### **Recommendations:**

The Foundation Visiting Committee recommends that Hawthorne Academy:

1. Review is mission and strategic language.
2. Engage the new Head of School as quickly as possible in the conversations noted in Recommendation 1.
3. Prepare to make some bold moves to successfully differentiate Hawthorne Academy from its peer schools.
4. Open up strong communication channels to listen to the faculty concerns for Hawthorne Academy.