

Tucker-Maxon School Strategic Plan 2015 – 2019

I. Introduction

Tucker-Maxon School (TMS) has successfully educated thousands of deaf and hard-of-hearing (D/HH) children since 1947. The landscape has changed dramatically, however, since the school was founded. These changes include immunization against diseases that caused deafness, laws that require newborn hearing screening to detect hearing issues, a focus on intervention at the earliest possible age, digital hearing aids that are far superior in amplifying sound, and perhaps most profoundly, the advent of cochlear implants. Ninety percent of deaf children are born to hearing parents who usually want their children to mainstream into public schools as soon as possible. Like many private schools founded to provide deaf education, TMS has struggled financially over the past 20 years. TMS led the way in oral education in the 1950s. It was a pioneer working with cochlear implants in the 1980s. In 2000, TMS began co-enrolling deaf and hearing students together so deaf children would have hearing peers. TMS will continue to be the premiere school for children who are deaf and hard-of-hearing in the region.

This strategic plan establishes goals for the next five years and provides a road map for future success and sustainability at the school. Input to the plan was provided in the fall of 2014 by the Board, staff, funders, parents of current students, alumnae, parents of alumnae, hearing professionals, deaf education leaders, and members of the deaf community. The planning process included extensive surveys of other private schools in the Portland market and schools for deaf education nationwide. The process began with a series of over 60 interviews. Both the Board and staff determined the school's Strengths, Weaknesses, Opportunities and Threats (SWOT analysis). The staff participated in an online survey and facilitated planning meeting. The process culminated in a day-long facilitated Board retreat on October 23, 2014. On January 22, 2015 the Board of Directors approved the new five-year strategic plan. The strategic plan will be completed by June 30, 2019.

This strategic plan is divided into eight parts:

- I. Introduction
- II. Board and Staff SWOT Analyses
- III. Mission, Vision, Values
- IV. Financial Health and Sustainability
- V. Governance and Board Development
- VI. Educational Program
- VII. Marketing and Outreach
- VIII. Staff and Human Resources
- IX. Operation, Facilities and Safety

II. Board and Staff SWOT Analysis Summary

A. Strengths:

- Near 70-year history
- Own land and buildings
- Co-enrollment of deaf and hearing
- Dedicated, experienced staff
- Masters-level educated teachers
- LSLS certified staff
- Option School requirements met
- Low 8:1 student-to-teacher ratio
- National reputation for excellence in deaf education
- Onsite Audiology and SLP
- Art, music, playground, climbing wall, gardens, animals, daily PE
- Support by Oberkotter, Rose Tucker, and other significant funders

B. Weaknesses:

- Financial sustainability
- Decreasing reserves
- No state funding
- Most school districts don't reimburse
- Development Director turnover
- Marketing, brand, signage
- Board development
- Staff salaries
- Parents disconnected from Board
- Academic measurement over time
- Alum tracking and relations
- Online presence

C. Opportunities:

- Increase enrollment
- Increase tuition
- Increase fundraising
- State funding from school districts
- Board development, fundraising
- Social and emotional intelligence curriculum
- Insurance billing
- Become a deaf services center
- Summer camp
- Increase Early Intervention (EI) and preschool pipelines
- Tele-intervention
- Website and social media
- Parent Teacher Organization volunteers
- Capital campaign
- School pride, mascot, brand clothing

D. Threats:

- Adapting to change
- Lower incidence of deaf and hard of hearing children now
- Technology allows children to move to public schools sooner
- Deferred maintenance on facility
- Perception of elite private school
- National edge
- Leadership transitions
- Economic booms and busts

III. Mission, Vision, Values

The Board reaffirms the following:

Mission: To teach deaf and hearing children to talk, learn, and achieve excellence together.

Vision: Tucker-Maxon School will be a parent's first choice for listening and spoken language instruction, delivering services of outstanding quality for children, birth through grade 5.

Values: Conversation, Confidence, Creativity, Community

Tagline: Where every child has a voice.

IV. Financial Health and Sustainability

In 2014, the Board created a new leadership structure with an Executive Director to focus on business, marketing and fundraising, and a school Principal to focus on education, curriculum and students. In June 2014, a new Executive Director was hired and a veteran teacher with 28 years at Tucker-Maxon was appointed Principal. This new leadership structure is the first step toward increased sustainability.

A. Earned income

1. Increase earned income by 10%, from 55% to 65% of total revenue over the next three years to increase sustainability.
2. Increase student enrollment by 15% over the next three years. This moderate increase will maintain a low student to teacher ratio at the school while generating increased revenue. TMS will create a referral program for current families to increase enrollment.
3. TMS tuition is lower than almost all of the 22 schools surveyed in September 2014. TMS will increase tuition gradually to more accurately reflect the market average. New tuition rates will be announced in January each year for the following September. We will monitor results to ensure tuition increases do not adversely affect enrollment.
4. Tuition discounts:
 - a. Staff discounts will be reduced in phases over the next three years to align with 2014 survey results for Portland area private schools. Children of staff who are deaf or hard-of-hearing will also be eligible for financial aid in accordance with school policy. Other relatives of staff will not be included in discounts.
 - b. Sibling discounts for all families with more than one student will be reviewed and revised as needed.
 - c. TMS will request families pay full annual tuition by September for the school year with a discount, sign up for automatic payment, or pay a small finance fee to pay monthly. A twice-annual payment option may also be made available. Existing refund policies will be revisited in light of annual payment.
5. Early Intervention (EI) free trial period will be reduced from six to three months. These families will also be eligible for financial aid. TMS will explore additional recruitment options for increasing EI enrollment.
6. TMS will continue to develop clinical services for audiology, speech language pathology, early intervention and tele-intervention to diversify revenue and will bill insurance whenever possible.

7. TMS will continue to advocate for state funding by establishing positive relationships with school districts and state officials.
 8. TMS will develop a profitable summer camp to leverage the campus asset.
- B. Contributed income:
1. Fundraising revenue will increase by 10% overall in the first three years of the plan.
 - a. Foundations: TMS will continue positive partnerships with key funders the Oberkotter Foundation and Rose E. Tucker Charitable Trust, and local foundations will be key sources of contributed revenue.
 - b. Individuals: TMS will systematically research, cultivate, solicit and steward major individual donor prospects, including alum families and past Board members.
 - c. Corporations: TMS will increase business contributions by 20% by focusing on annual auction sponsorships.
 - d. Events:
 - i. Annual Auction gross revenue will grow by 25% in the next three years.
 - ii. TMS will consider adding a solicitation breakfast or lunch event.
 2. TMS will consider an annual family fundraising requirement, similar to parochial schools.
 3. TMS will create a well-defined donor recognition program to acknowledge donors.
- C. Financial Aid criteria and process will be revised so that the school distributes its limited resources to families with D/HH children that need them most. The Board will choose the level of financial aid each year based on a pre-approved budget line.
- D. TMS will build a reserve in five years that enables the school to sustain programs for six months and make emergency building repairs.
- E. TMS will increase from a part-time to a full-time finance director position to manage the organization's finances as soon as possible.
- F. Future TMS budgets will include a moderate contingency fund for unanticipated needs.
- G. TMS will establish a board restricted endowment fund. All bequests and planned gifts will be directed by default to this endowment fund. TMS will budget to utilize 5% of the endowment corpus each year for operations.
- H. TMS will consider a campaign for capital improvements and endowment in the next two years.

V. Governance and Board Development

- A. The Board will focus on policy governance and oversight.
- B. The Board will review its current structure including number of Directors, Committees, member composition, fiduciary responsibilities and succession planning.
- C. The Board may consider the parent of a current student for nomination to the Board, with the understanding that the Board member represents the school and not the parent group.
- D. The Governance Committee will perform a Bylaws review every other year, beginning in 2015, to recommend revisions to the Board, including possible Board term limits.
- E. The Governance Committee will recommend a fundraising policy that defines fundraising goals for all Board members, including 100% participation in giving and fundraising.
- F. TMS will develop a Policy Manual to include all major policy decisions of the Board.

VI. Educational Program

- A. From 2015-19, TMS will continue to provide 1) Early Intervention services for children from birth to age three, 2) Preschool, and 3) Kindergarten through fifth grade (elementary school).
- B. TMS will be the national “gold standard” for Listening and Spoken Language (LSL) education. TMS will continue to be a leader in the Option School movement for deaf education.
- C. TMS will continue to focus on social and emotional learning (SEL) for all students. This reflects the current practice of teaching empathy, respect for differences and relationship skills. This focus will help differentiate TMS in the market for private schools.
- D. The School Principal will measure the academic success of TMS students with state benchmark testing each year that enables TMS to measure its success.
- E. TMS curriculum will be aligned with state standards, have seamless continuity from preschool through 5th grade, integrate literacy, language proficiency and social-emotional development in a clear and measurable manner. TMS will have unity of purpose in selection of curriculum, staff training, assessment of student learning and teacher effectiveness.
- F. TMS will include Science Technology Engineering and Math (STEM) in elementary school.
- G. TMS will also measure its success with an annual survey of school parents every January.
- H. TMS will balance enrollment growth with the appeal of small class size and low student-to-teacher ratios.
- I. Continuing education expenses for teachers and staff will be budgeted each year.
- J. TMS will have the highest number of Listening and Spoken Language Specialist (LSLS) certified instructors in the region.

VII. Marketing and Outreach

- A. Our goal is to go from being Portland’s “best kept secret” to a household word in five years.
- B. With the current leadership structure, the Executive Director will take a more external role, creating higher visibility and more partnerships for the school.
- C. TMS will increase its outreach to deaf and hard-of-hearing professionals and the deaf community in order to increase enrollment of deaf children, including AG Bell, Option Schools, Oregon’s Early Hearing Detection and Intervention (EHDI) program, the Oregon Academy of Audiologists (OAA) and the Oregon Speech and Hearing Association.
- D. TMS leaders will attend annual national AG Bell, Option Schools and EHDI conferences.
- E. TMS will market itself as a leader in Listening and Spoken Language (LSL) for deaf children and as a high-quality education for all children.
- F. TMS will further differentiate itself in the market by emphasizing its focus on social and emotional learning.
- G. TMS will formally remove the word “Oral” from its name in 2015. This term has been largely replaced nationally with Listening and Spoken Language (LSL). This change also reflects the school’s co-enrollment of both hearing and deaf and hard-of-hearing students.
- H. The TMS website will be revised in 2015 so that prospective families choose to tour the school or visit during scheduled open houses.

- I. To increase enrollment, TMS will increase its advertisement budget and hire marketing personnel, as funds become available, to focus on graphic design, website management, brand awareness and public relations.
- J. TMS will return to publishing an Annual Report after each year's Audit is completed.
- K. TMS will present a consistent brand to the public by utilizing a style and brand guide.
- L. In 2015, TMS will begin preparing for its 70th anniversary celebration in 2017. TMS will consider launching a capital campaign to coincide with the anniversary.
- M. TMS will replace current street signage with a much more effective sign.

VIII. Staff and Human Resources

- A. TMS will recruit, train, reward and retain the most qualified staff.
- B. Each year, the Executive Director and Principal will review salary surveys for the Portland metro market relative to all TMS positions with a goal of paying staff competitively.
- C. Based on survey results and available resources, staff salaries will be increased as soon as possible.
- D. TMS has added a Short-Term Disability insurance policy and will decrease sick leave accruals accordingly in 2015.
- E. Management will advertise and hold interviews for all staff positions with an open and competitive process.
- F. TMS will participate in the Top 100 Nonprofits to Work for in Oregon survey each year.
- G. TMS will continue to develop its Parent Teacher Organization (PTO) to engage and recognize volunteers at the school.
- H. TMS will begin succession planning for leadership positions on both the staff and Board with a goal of having successful leadership transitions.
- I. The Executive Director and Principal will establish systemic annual performance evaluation for all employees.
- J. Management will develop cross-over training and redundancy in skill sets to cover for staff absences.

IX. Operation, Facilities and Safety

- A. Safety of our students is our highest priority.
 - 1. TMS will continue to require background checks on all employees and volunteers.
 - 2. TMS will perform all annual safety evaluations and drills in a timely fashion.
 - 3. TMS will add a security camera at the front door in 2015.
- B. TMS will devise a technology plan and budget annually for educational technology improvements.
- C. TMS will focus on priorities in deferred maintenance, including roofs, HVAC, signage and updated technology in the next five years.