

CHESHIRE ACADEMY

STRATEGIC PLAN

Individual Growth. Global Purpose.



Approved June 5, 2026

Cheshire Academy Strategic Plan

Individual Growth. Global Purpose.

Developed in partnership with EXPLO Elevate through a community-wide listening process, 2025–26

MISSION

Cheshire Academy challenges and supports individual students in developing the character, critical thinking, and confidence to flourish as purposeful global citizens.

VISION FOR THE STRATEGIC PLAN

At Cheshire Academy, students are known, challenged, and educated as active participants in their own learning, honored for who they are and who they are becoming. It is a place where faculty are supported to grow in every dimension of their role and programs are designed with intention and care to develop people of character, ready to live purposeful lives as global citizens.

VALUES

Belonging.
We welcome and celebrate diversity and create an environment where everyone feels respected and valued for who they are. We seek to understand and share the feelings of others, showing compassion and kindness in all we do.

Engagement.
We are present. Engaging with our community connects us to our school and to each other — and when we are engaged, we are far more likely to thrive academically, socially, and emotionally.

Collaboration.
We are honest and reliable. We build relationships grounded in mutual respect, leverage each other's strengths and perspectives, and hold one another accountable.

Growth.
We are always learning and improving. We seek feedback and actively pursue opportunities to develop ourselves and support the development of others.

THE TWO NON-NEGOTIABLES

Our "must achieve" goals. Failure to achieve either means the strategic plan has failed. Everything else must support these two priorities.

1. Cheshire Academy will secure and sustain a level of financial health sufficient to serve current students and generations to come.
2. Cheshire Academy will distinguish itself as the school for a high-caliber, multi-faceted education where expert faculty guide students' ownership of their personalized pathway to becoming purposeful citizens of the world.

THE FIVE CRITICAL INGREDIENTS

The essential strategic elements required to achieve our Non-Negotiables — and the resources required to bring them to life.

CI 1 — **Attracting, Growing, and Retaining Outstanding Faculty and Staff**
Our people are the foundation of everything.

CI 2 — **Strategic Enrollment: Right Students, Right Mix, Right Size**
Enrollment as a strategic act that shapes culture and finances.

CI 3 — **Developing Distinctive Programs That Define a CA Education**
Academics, athletics, arts, and global citizenship — each fully realized, all essential.

CI 4 — **Renewing Campus Facilities to Catalyze Our Programs**
Spaces that catalyze our people, programs, and mission.

CI 5 — **Mobilizing the Resources to Realize the Plan**
None of this happens without the philanthropic commitment to fund it.

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This strategic plan results from months of listening to students, faculty, staff, families, alumni, and trustees. It reflects our community's beliefs about Cheshire Academy — what it is, what it aspires to become, and what it commits to in the next chapter. At its core, the plan is built around a simple structure: two Non-Negotiables that define what we must accomplish, five Critical Ingredients that explain how we will achieve them, and shared language and definitions that ensure everyone, trustees, faculty, families, and students, work toward the same vision. What follows is not a description of where Cheshire Academy already stands. It is a declaration of where we are going and an honest acknowledgment that getting there will require more than strong leadership and dedicated faculty. It will require philanthropic investment in our people, our programs, and our facilities, and the board's active partnership in securing it. This plan was shaped by every voice in our community. Bringing it to life belongs to all of us.

Defining Our Terms

Shared language is the foundation of shared purpose. The definitions below clearly define the words central to our strategic plan, ensuring that trustees, faculty, staff, families, and students all share a common understanding of what Cheshire Academy aims to achieve. The framework for financial health was created by the Finance Committee of the Board of Trustees. The definitions of key terms in Non-Negotiable 2 were developed by the Academic Council. Both reflect the expertise and careful consideration of those closest to the work.

NON-NEGOTIABLE 1

1	*Cheshire Academy will secure and sustain a level of financial health sufficient to serve current students and generations to come.*

Defining Financial Health

Financial health encompasses far more than balanced budgets or positive cash flow. It represents the institution's capacity to fulfill its mission consistently, invest strategically in people and programs, maintain and improve physical assets, and ensure long-term sustainability across changing market conditions. Taken together, the metrics below, both quantitative and qualitative — paint a complete picture of institutional wellness.

This framework serves multiple purposes:

- Guide annual budgeting and multi-year financial planning
- Inform board discussions about resource allocation and priorities
- Provide transparent standards for measuring progress
- Enable data-driven decision-making about strategic initiatives
- Support stakeholder conversations about institutional priorities

By establishing these clear definitions, we create accountability, focus strategic efforts, and ensure that trustees, faculty, and families share a common understanding of what institutional success requires.

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1. Multi-Year Financial Projections

- Ability to confidently project budgets, revenue, and expenses at least five years forward using reliable data and realistic assumptions
- Annual review and update of multi-year projections to reflect changing circumstances and incorporate lessons learned

2. Operating Results

- Consistent achievement of balanced budgets or operating surpluses, except in extraordinary circumstances such as major capital investments or unforeseen emergencies
- Minimal to no reliance on borrowing from cash reserves except for genuine emergencies

- Development and tracking of non-tuition, non-annual-fund revenue streams — auxiliary services, facility rentals, summer programs, and similar sources — with clear targets for operating budget contribution

3. Advancement — Annual Fund and Endowment

Annual Fund and Philanthropy

- Annual fund contributions approaching 8–10% of the operating budget, demonstrating strong philanthropic support and reducing tuition dependence
- Clear participation targets across all constituent groups: parents, alumni, faculty, staff, trustees, and grandparents
- Year-over-year growth in both dollars raised and participation rates
- Advancement cost-to-revenue ratio maintained at industry best practices (typically $0.15–0.25 per dollar raised)
- Dedicated tracking of dollars raised for financial aid and scholarship endowment

Endowment Growth and Management

- A dedicated planned giving program — including bequest intentions, charitable gift annuities, and estate planning resources — to build endowment principal over the long term through the generosity of alumni, parents, and friends
- Targeted endowment campaigns tied to specific institutional priorities: faculty compensation, financial aid and scholarships, program innovation, and facility maintenance and renewal
- Endowment contributions budgeted as a standing institutional commitment, not a discretionary line item
- A board-approved spending policy that preserves principal, targets a sustainable annual distribution rate, subject to periodic board review considering investment performance and evolving institutional need.
- Endowment growth benchmarks established and reported annually to the Board, with clear targets aligned to the financial demands of the strategic plan

4. Deferred Maintenance and Capital Investment

- A fully funded, systematic schedule for deferred maintenance addressing buildings, grounds, and physical plant needs proactively, not reactively
- Demonstrated capacity to invest in campus infrastructure, including facility upgrades, technology systems, and sustainability initiatives
- Capital reserve fund adequate to address both planned improvements and unexpected facility needs

5. Student Enrollment Mix

- An optimal and intentional mix of boarding (international and domestic) and day students, with clear targets for each segment and full awareness of their distinct financial impacts — discount rates, full-pay proportions, and programmatic costs
- Enrollment targets established annually by the Head of School in consultation with the CFO and Dean of Enrollment Management, approved by the Board of Trustees, and reported against at each Board meeting — creating a clear line of accountability from the Admission Office through senior leadership to the Board
- Metrics tracking enrollment stability, yield rates, and retention across all student populations, with results shared transparently with the Leadership Team and Board on a defined reporting schedule
- A formal annual review in which actual enrollment outcomes are measured against targets, variances are explained, and adjustments to strategy are documented and acted upon — not simply noted
- Enrollment goals balanced with mission fulfillment and program quality, with the Head of School responsible for surfacing tension between financial enrollment pressures and mission integrity when it arises

6. Faculty Recruitment and Retention

- A dedicated recruitment budget that enables CA to compete for exceptional educators, covering search costs, candidate visits, relocation support, and the compensation packages necessary to attract talent at every career stage

- Meaningful professional development, clear career pathways, and advancement opportunities for faculty at all stages, funded as a standing budget line rather than a discretionary expense subject to annual cuts
- Faculty housing, on-campus amenities, and quality-of-life supports recognized as part of the total compensation picture and resourced accordingly, particularly for boarding faculty whose commitment to the institution extends well beyond the classroom
- Faculty turnover monitored with a goal of retaining high performers while allowing for healthy attrition, with exit interview data used to identify and address systemic retention risks before they compound
- Regular faculty satisfaction surveys with positive trends in morale and engagement, with Leadership Team and Board accountability for responding to what the data reveals, not simply receiving it

7. Compensation and Benefits

- Achieving and sustaining competitive compensation requires a significant, sustained financial commitment — one that must be built into multi-year budget planning, prioritized explicitly in Board discussions about resource allocation, and treated as a non-negotiable investment in the institution's ability to deliver on its mission
- A compensation scale actively designed to make CA a destination for outstanding educators at every career stage — transparent in its structure, flexible in its application, and benchmarked to attract, reward, and retain exceptional talent — with clear salary bands, visible advancement pathways, and a framework that responds to faculty feedback and market realities
- Comprehensive benefits packages supporting faculty well-being, work-life balance, and long-term financial security — including healthcare, retirement, housing where applicable, and on-campus quality-of-life supports that reflect the full scope of what CA asks of its faculty
- Annual benchmarking against peer institutions and geographic market realities, with results reported to the Board and a defined process for translating findings into budget action

8. Tuition Strategy

- Regular, data-informed reviews of tuition-setting processes to ensure alignment with market realities, competitive positioning, and institutional goals
- Evidence-based policies for tuition discounting and financial aid that support enrollment objectives while maintaining net revenue targets
- Monitoring of the relationship between published tuition, discount rates, and net tuition revenue
- Appropriate transparency about tuition strategy with trustees, faculty, and families

9.. Intangible and Qualitative Markers

- Evidence of faculty satisfaction, morale, and capacity for innovation through retention of key personnel, quality of curriculum development, student engagement metrics, and qualitative feedback
- Positive artifacts of mission delivery: new program launches, academic achievements, student growth outcomes, and external recognition
- Indicators of institutional vitality that don't appear on financial statements but signal organizational health: faculty collaboration, student initiative, community engagement, and creative problem-solving
- Assessment of whether financial resources are being deployed in ways that demonstrably advance our educational mission and strategic priorities

10. Revenue Office Coordination and Strategic Alignment

- Regular coordination between Advancement, Enrollment Management, and Finance to align strategies, share data, and identify opportunities for mutual support
- Shared goals and metrics across revenue-generating offices that demonstrate integrated strategic thinking and collaborative execution
- Systems for tracking how advancement efforts support enrollment and retention — for example, parent engagement improving retention, alumni networks facilitating recruitment, and scholarship fundraising enabling strategic enrollment goals

– Documentation of cross-functional collaboration producing measurable institutional benefit

NON-NEGOTIABLE 2

2 ***Cheshire Academy will distinguish itself as the school for a high-caliber, multi-faceted education where expert faculty guide students' ownership of their personalized pathway to becoming purposeful citizens of the world.***

The language of Non-Negotiable 2 is intentional and precise. Each phrase represents a commitment — to a particular kind of education, a particular relationship between faculty and students, and a particular kind of graduate. The definitions below give that language its full meaning.

High-caliber education	Challenging, well-supported learning that goes deep into important ideas and is centered on transformative learning experiences, developing a global perspective, individual and collective wellbeing, and 21st-century skills and capacities.
Multi-faceted education	Deliberate whole-student growth that balances the breadth of a liberal arts education with the personalized, meaningfully individual approach of progressive education.
Expert faculty	Teachers with deep content knowledge and brain-informed, relational pedagogy who design coherent, active, and collaborative learning so that diverse students can unpack complex ideas and apply them.
Students' ownership	Students driving their learning by setting goals, making informed choices, monitoring their progress, and reflecting on how to improve — with adults coaching rather than controlling the process.
Personalized pathway	A bespoke course of study with the right balance of challenge and support for each student's strengths, interests, goals, and needs.
Purposeful citizens	Graduates who understand how their lives connect to the wider world and who bring self-confidence, character, critical thinking, empathy, and integrity to contribution toward a more just and equitable common good — advocating for themselves and others through service, inquiry, and cross-cultural engagement.

The Five Critical Ingredients

The Two Non-Negotiables tell us what we must achieve. The Five Critical Ingredients tell us how. Each one addresses a distinct dimension of the work — our people, our students, our programs, our campus, and the resources required to fund it all — and together they form the actionable framework for the next chapter of Cheshire Academy. All five are essential; none can be sacrificed. How we sequence and resource them may shift as conditions evolve, but our commitment to meaningful progress across all five does not.

Critical Ingredient 1: Attracting, Growing, Retaining Outstanding Faculty & Staff

Cheshire Academy's ability to deliver on both Non-Negotiables depends on the quality of the people who bring them to life. Developing and sustaining a faculty of *expert educators* — teachers with deep content knowledge,

brain-informed pedagogy, and the relational capacity to guide *students' ownership* of their *personalized pathways* — is the foundation of everything else in this plan. That means competing for talent, investing in growth across every dimension of the faculty role, and building a culture where outstanding people choose to stay.

Attracting and Compensating Outstanding Educators

- Competitive compensation grounded in a transparent, progressive salary structure, benchmarked regularly against peer schools and geographic market realities
- Comprehensive benefits supporting faculty well-being, work-life balance, and long-term financial security
- Robust onboarding and mentoring for new faculty, with clear pathways for career advancement and leadership development

Developing, Supporting, and Retaining Faculty & Staff in All Their Roles

- Workload structures that account realistically for the full scope of faculty responsibilities — classroom teaching, coaching, advising, club leadership, arts direction, and residential life — with adequate staffing, manageable class sizes, and protected time for curriculum development
- A comprehensive professional development program spanning all faculty roles, with dedicated collaboration time and training in differentiated instruction, mind-brain education, student-centered pedagogy, and global citizenship education
- A growth-oriented culture with clear expectations, individualized development support, and meaningful recognition of excellence, in the classroom and beyond, that makes CA an employer of choice

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Critical Ingredient 2: Strategic Enrollment: Right Students, Right Mix, Right Size

Enrollment is not simply a numbers game — it is a strategic act that shapes our culture, our finances, and our capacity to deliver on both Non-Negotiables. Sustaining the *financial health* defined in Non-Negotiable 1 requires an intentional enrollment mix that optimizes net tuition revenue across student populations. Delivering on Non-Negotiable 2 requires honest alignment between who we admit and who we can serve well — academically, programmatically, and personally. Both demands must be met simultaneously, and neither can be subordinated to the other.

Defining and Attracting the Right Students

- Clear articulation of student profiles across our three populations (international boarding, domestic boarding, and day), encompassing academic readiness, personal qualities, program fit, and financial capacity, with full awareness of the distinct financial implications of each
- Admission criteria that serve both educational goals and financial sustainability, with right-sizing targets for each population that support net tuition revenue goals without compromising program quality or mission delivery
- Leveraging the full breadth of CA's program offerings — academics, athletics, arts, and student life — as enrollment drivers that speak to diverse student interests and family priorities

Building a Resilient, Diversified Enrollment Pipeline

- Diversification of international recruitment beyond traditional markets to reduce geopolitical and financial risk
- A strengthened regional day student pipeline through enhanced marketing, community engagement, and clear articulation of CA's value for local families
- A reimagined approach to domestic boarding recruitment that addresses current financial aid constraints and broadens our reach
- Multi-year enrollment and revenue modeling — backed by market research and demographic analysis — that informs decisions about faculty hiring, financial aid strategy, facility investment, and program expansion

Managing Enrollment with Precision and Discipline

- Net tuition revenue targets driving enrollment mix decisions, with clear performance indicators tracking yield rates, discount rates, full-pay proportions, and retention across all populations

- Strategic financial aid management that balances access, diversity, program support, and net revenue optimization
- Optimization of the conversion funnel from inquiry through enrollment, with particular attention to application and yield rates
- Enrollment resilience built through a diversified student mix capable of weathering market fluctuations and geopolitical shifts

Critical Ingredient 3: Developing Distinctive Programs That Define a CA Education

Non-Negotiable 2 commits us to a ***high-caliber, multifaceted education*** where faculty guide *students' ownership* of their *personalized pathways* toward becoming *purposeful citizens of the world.* This Critical Ingredient is where that commitment becomes concrete. A CA education is defined not by any single program but by the purposeful integration of all of them. Our programs must be distinctive enough to fulfill that promise, develop the whole student, and distinguish us in a competitive marketplace.

Signature Academic Programs and Personalized Pathways

- Strengthening the International Baccalaureate® Diploma Programme and expanding the Global Citizenship Diploma as defining academic distinctions
- Developing and expanding the Roxbury Center for Learning & Leadership as a distinctive strength — a comprehensive, multi-strand program that reflects CA's commitment to meeting every student where they are and equipping them to thrive
- Developing personalized learning pathways that balance student agency with rigorous academic standards across 100+ course offerings, supported by flexible scheduling and strong academic support systems
- Ensuring curriculum excellence through vertical and horizontal alignment, clear benchmarks, and training in differentiated instruction that allows all students to pursue academic excellence alongside their co-curricular commitments
- A commitment to continuous programmatic renewal, anticipating emerging disciplines, pedagogical advances, and student needs as they evolve, including current investments in artificial intelligence literacy and brain-informed learning that will deepen and expand over the life of this plan

Athletics, Arts, and Learning Beyond the Classroom

- Elevating CA's athletics programs as mission-aligned points of distinction — developing competitors, teammates, and people of character, while positioning them as meaningful enrollment draws for prospective families who seek a school where competitive excellence and personal growth go hand in hand
- Elevating CA's fine and performing arts as a defining expression of our mission — developing artists, musicians, creators, collaborators, and people of imagination, and serving as a meaningful enrollment draw for prospective families who seek a school where creative excellence, disciplined craft, and whole-student growth are inseparable from academic rigor
- Robust co-curricular programming and student leadership opportunities that extend learning beyond the classroom, complementing and deepening the personalized pathways each student builds

Global Citizenship, Service, and Community Life

- Leveraging CA's international diversity to create authentic cross-cultural learning inside and outside the classroom, and expanding international partnerships and exchange programs
- Developing the Center for Global Citizenship to house world languages, cultural programs, and international student resources, and integrating character development, critical thinking, and confidence-building across all programs as expressions of our mission
- Cultivating a culture of service as a thread through the CA experience, supporting students who initiate community engagement independently and growing intentionally toward sustained, school-facilitated service partnerships at the local, national, and global levels
- A strengthened advisory system that ensures every student has a trusted adult advocate and dedicated one-on-one meetings — the relational infrastructure for genuine personalized pathways

- Building on CA's existing culture of day and boarder integration — where the playing field, stage, and studio already create shared purpose — by deepening connections through weekend programming, student-led initiatives, and off-campus community experiences

Critical Ingredient 4: Renewing Campus Facilities to Catalyze Our Programs

Our ability to deliver on both Non-Negotiables is constrained by the spaces in which we do the work. Achieving the *financial health* of Non-Negotiable 1 requires facilities that support recruitment, reduce deferred maintenance costs, and reflect the institutional quality that families and faculty expect. Delivering on the *high-caliber, multi-faceted education* of Non-Negotiable 2 requires spaces purposefully designed for how we teach, coach, create, and live together. Facilities are not an end in themselves — they catalyze our people, our programs, and our mission.

Priority Projects

- Center for Fine and Performing Arts: Transform Hurley and Woodbury Halls into a unified facility with professional-quality performance spaces, dedicated visual arts studios, and state-of-the-art technology
- Center for Global Citizenship: Repurpose the current art building to house world languages, cultural programs, and international student resources
- Vanacore College Counseling and Career Center: Relocate to Harwood Hall to create a welcoming, centrally located hub for students planning their next chapter
- Fencing Center: Partner with Apogee Fencing to build a top-tier facility within the Sheriff Athletic Center

A Long-Term Facilities Strategy

- A phased master plan guiding future investment in residence halls, athletic facilities, and large-capacity gathering spaces, maximizing existing infrastructure before committing to major capital expenditures
- Campus coherence that ensures every space serves its intended purpose, supports diverse learning approaches and student populations, and actively reflects our institutional values
- A capital campaign with project-level fundraising targets that recognize different donors are motivated by different programs and spaces, paired with a planned giving strategy to sustain long-term facility maintenance and renewal

Critical Ingredient 5: Mobilizing the Resources to Realize the Plan

A strategic plan is only as powerful as the resources committed to executing it. The Critical Ingredients above describe what Cheshire Academy must do over its next chapter — and none of it happens on net tuition revenue alone. Delivering on our Non-Negotiables will require significant philanthropic investment: in our faculty, in our programs, in our campus, and in the financial aid that makes a CA education accessible to the students who belong here. This Critical Ingredient is about mobilizing that investment — naming the scale of resources required, defining the role of the Board of Trustees in securing them, and building the philanthropic infrastructure that will fund the next chapter of this institution. *Financial health*, as defined in Non-Negotiable 1, describes the destination. This is about building the engine that gets us there.

Naming the Resource Reality

- A frank acknowledgment that executing this strategic plan requires resource levels beyond what operating revenue alone can provide. This reality must be named clearly, planned for deliberately, and communicated honestly with trustees, major donors, and the broader community
- A comprehensive philanthropic case for support, developed in parallel with this plan, that connects each Critical Ingredient to specific funding needs and donor opportunities, making the ask concrete, compelling, and tied directly to the institutional mission
- Annual Fund goals that grow year over year toward the 8–10% of operating budget benchmark defined in Non-Negotiable 1, supported by coordinated communications that connect giving to the priorities of this plan

Defining the Board's Role

- The Board of Trustees, in adopting this strategic plan, accepts shared responsibility for resourcing it, understanding that governance leadership and philanthropic leadership are inseparable at this moment in the school's history
- Each trustee is expected to make a meaningful personal financial commitment to the plan and to leverage their networks, relationships, and influence in support of the institution's philanthropic goals, not as an ancillary expectation, but as a core dimension of board service
- Board leadership on fundraising will be structured, supported, and held accountable through clear giving expectations, regular reporting on progress against philanthropic targets, and active engagement in cultivation and stewardship of major gift prospects

Building Toward a Capital Campaign

- Groundwork for a future capital campaign begins now, including wealth screening, prospect identification, and the relationship-building and stewardship necessary to cultivate transformational gifts over a multi-year horizon
- A campaign infrastructure developed in years one and two of this plan, positioning Cheshire Academy to launch a formal campaign in years two through four when philanthropic momentum, institutional credibility, and donor readiness align
- Campaign priorities directly tied to the Critical Ingredients: endowment growth for faculty compensation and financial aid, capital investment in priority facility projects, and programmatic funding for the distinctive academic, athletic, and co-curricular experiences that define a CA education
- A culture of philanthropy that extends beyond the campaign itself — one in which giving to Cheshire Academy is understood as an act of belief in what this school is becoming, and sustained through meaningful stewardship, transparent reporting, and genuine gratitude

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Cheshire Academy has educated students for more than two centuries – through wars and recessions, through the rise of the internet and the reshaping of global education, through every disruption the world has sent its way. This plan does not ask us to become something we are not. It asks us to become more fully what we already are: a school where exceptional people do exceptional work, where every student is known and challenged, and where the education we offer is worthy of the families who trust us with their children and the world those children will inherit. The work ahead is significant. The foundation beneath us is strong. And this plan, like the education it describes, is not a finished product – it is a living commitment, one that will grow and adapt as our students, our faculty, and the world around us continue to change. The next chapter of Cheshire Academy begins now.

Get Involved

Want to learn more about Cheshire Academy's Strategic Plan?

Contact Head of School Tom Woelper P'26 at tom.woelper@cheshireacademy.org.