



HORIZONS[®]

THE EPISCOPAL ACADEMY

2023-2026 Strategic Plan

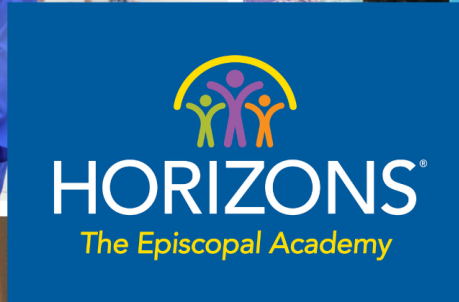




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Introduction and Executive Summary

Since the creation of the 2019 Horizons at Episcopal Academy (HEA) Strategic Plan, numerous events have impacted our students, families, and organization. From an organizational standpoint, some major milestones have been achieved. HEA celebrated the 10-year anniversary of this program. Reading Specialists, Math Specialists, and Counselors have been added to the summer program to enhance academic and social-emotional learning each summer and year-round tutoring is now available. Middle School electives have enriched the core curriculum, and students have been succeeding in swimming again after the pool closures and lifeguard shortages caused by the pandemic. HEA has also moved from theory into action, celebrating our first 8th grade graduation from the core program in 2020 while also initiating a formal high school program. HEA looks forward to celebrating our first HEA high school graduates in 2024. For the past 2 summers, the HEA high school program has employed a High School Program Director to oversee HS curricular and operational details on EA's campus and partnered with College Possible Philadelphia to provide additional college and mentoring support. Family survey responses from 2022 reflect some of these recent successes, with 100% of families saying, "they want their children to return to Horizons." In addition to HEA's growth, Horizons Greater Philadelphia (HGP), a regional organization, was launched in February 2020. HGP has since helped to add Horizons sites in the Philadelphia area, expanding from 2 to 6 programs, with more to come, creating a larger network for regional collaboration and sharing of best practices.

The Need in the Philadelphia Area

Despite HEA and HGP's accomplishments, the need for accelerating learning recovery for our students is more urgent than ever.^{1,2} There is an extensive, chronic need in the Philadelphia region for sustainable educational programs that offer a path out of poverty. As of 2022, Philadelphia has the highest poverty rate (23.1%) of any large city in the United States. Currently, 37% of the children in the city live in poverty, with about half of these children living in deep poverty (defined as income of less than half the poverty threshold or ~\$10,000). Across the country, students from communities experiencing educational inequity have been negatively impacted by school disruptions during the pandemic. A recent report highlights these inequities: "As US students return to classrooms, some are catching up on unfinished learning, but others are falling further behind, widening pre-pandemic gaps."³

The nation's "education report card," issued by the NAEP in 2022 shows the tremendous impact of the pandemic across the country and in our area.^{4,5} The impact on education for students from the Philadelphia area has been severe:^{6,7,8}

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- 77% of students are below math proficiency
 - 72% of students are below reading proficiency
 - 25% of students did not graduate high school in 2022 with fewer graduates anticipated for 2023
 - Of students who attended post-secondary school, 25% graduated college and 5.1% earn an associate degree


HEA remains focused on our core belief that *every child in the Philadelphia area should have access to quality educational opportunities*. This strategic plan which is informed by feedback from our valued stakeholders will guide our activities over the next three years so that we can deliver high-quality academic programming and out-of-school support to HEA children and families in a sustainable way.



Organizational History

Founded in 1964, **Horizons** is a national network of high-quality, tuition-free, immersive, academic, and enrichment programs for children from communities experiencing educational inequity. The Horizons model provides out-of-school support for the duration of a child's K-8th

grade education and many sites across the network offer continued high school support. There are currently 74 programs across 20 states, hosting 6,740 students per year.



HEA was launched in 2013. During the first 6-week summer session, 30 kindergarten and first grade students from Frederick Douglass Charter School, located in Philadelphia, were enrolled. In 2016, Ardmore Avenue Elementary School was added as a second partner school. In 2021, Overbrook Educational Center was added as a third partner school. Adding a new kindergarten class each summer, the program has been at capacity providing summer learning opportunities for approximately 135 students in grades K-8 for several years now, with additional spots for our high school students. Of note, once students are enrolled in our HEA program, if they change schools, they are still eligible to attend the program.

The Episcopal Academy (EA) has a long tradition of forming strong community partnerships in the Philadelphia area, with HEA as one of its strongest and longest partners. EA is thrilled to support the HEA program by providing its 123-acre campus and back office support and by sharing the deep knowledge and skill base of some of its teachers and administrators. EA welcomes the opportunity for its students to work at HEA through both volunteer and paid positions. As a community, EA is eager to support Horizons and to take part in a larger effort to advance equitable learning opportunities for all students.

Mission

After reviewing the Horizons National Strength-Based Communication Guide which was released in 2022, HEA adopted the Horizons National Mission as our Mission, consistent with many other Horizons affiliates. This statement was approved by the HEA Board in October of 2022, and it has helped to guide our taskforce and Committee Chairs on our “Why?” as we have moved through our strategic planning process and envision HEA’s future.

Our Mission: We advance educational equity by building long-term partnerships with students, families, communities, and schools to create experiences outside of school that inspire the joy of learning.



Program

Our program offers a project-based curriculum focused on reading, STEM, art, fitness, drama, and field trips. Swimming and other confidence-boosting activities break down barriers to success and expose children to new opportunities. Most students join HEA the summer after kindergarten and return to the program each year through at least 8th grade, building lasting relationships with their teachers and peers, and developing life skills essential for success. In addition, HEA offers school year tutoring, an emphasis on Social-Emotional Learning, and a High School program in partnership with College Possible.

Program highlights include:


- 6 weeks of full day academic instruction, enrichment, and swimming each summer
- 3 hours per day spent on reading, math, and Project-Based Learning
- Daily guided reading led by Reading Specialists and math support led by a Math Specialist
- Daily enrichment classes including art, STEM, language, drama, physical education, and swim instruction
- Middle School electives to improve student engagement
- Field trips/experiential learning/career speakers tailored by grade level
- 7 to 1 student to teacher ratio as well as Program Director, High School Director, Middle School Dean, 3 Reading Specialists, 1 Math Specialist, 2 counselors and 1 Nurse
- Pre and end of summer assessments to track progress
- Daily bus transportation to and from EA with breakfast, snack, and lunch provided
- 4 Super Saturdays of enrichment and community building during the school year, plus family events at partner schools and on campus at EA
- School year tutoring on site at two partner schools

Vision/Results

HEA seeks to foster a joyful learning environment full of academic, artistic, and athletic activities that inspire young minds and encourage confidence.

Vision: Our vision is a future in which every child thrives.

On average, Horizons students advance 6 to 10 weeks in reading and math skills each summer, have higher school-year attendance, and are more likely to graduate from high school.



Nationally, 97% percent of Horizons high school students graduate and 91% of graduates go on to attend college or some form of post-secondary education.

2023 Strategic Plan

Methodology

To date, HEA has been operating using the 2019 Strategic Plan and the 2022 HGP Strategic Plan as our primary operating guides. Led by Chair, Bonnie Lo, the HEA board agreed to undertake a formal strategic planning process beginning in July of 2022. The strategic planning committee included: Lauren Collins (Committee Chair), Bonnie Lo, and Courtney Delaney with external input from regional site HGP Executive Director, Kathy Jacoby, and Horizons National Executive Vice President, Jose Oromi.

In order to generate the 2023 Strategic Plan, HEA's Board of Directors and Board Observers, HEA staff, Horizons parents and families, and HEA key partners (including EA, Horizons Greater Philadelphia, partner schools and several funders) were asked to complete a survey in September 2022. The results of the survey were reviewed and analyzed. Survey participants and other stakeholders were also asked to participate in a semi-structured interview for additional feedback in September and October 2022. Results from surveys and interviews were presented in the Board of Directors meeting on October 20, 2022 as part of the initial Strategic Plan kick-off by Jose Oromi, Executive Vice President, Horizons National.

Based on a summary of data inputs, the Strategic Planning task force drafted strategic objectives for each Committee Chair to review, modify and update with their committee members. From November to January 2023, each Committee identified short and long-term priorities and began to compile additional strategic actions. In January 2023, the Board of Directors convened for an interactive Strategic Planning Mini-Retreat, facilitated by Ayinde Tate (HEA Board Observer and EA Director of Diversity and Inclusion). During this session, Executive Director, Courtney Delaney, led the board in a grounding exercise to identify the "Why?" for HEA. Then, each Committee Chair presented their ideas to the entire board for feedback and input using a "pros and grows" facilitation technique. Following this retreat, the Strategic Planning task force compiled a final draft of the updated Strategic Plan which was voted on and approved at the Board meeting in March 2023.



Input:

The following input was utilized to inform the 2023 Strategic Plan:

- HEA 2019 Strategic Plan
- Horizons National Quality Band
- Horizons Greater Philadelphia (HGP) and other Horizons Regional Strategic Plans
- Horizons National Affiliate Strategic Plans
- Key Stakeholders Survey (38 responses with diverse representation including 7 parents/families, 10 HEA staff, 17 HEA Board members, 2 EA admin/staff, 2 key partners)
- Horizons Strength-Based Communication Guide
- Interviews with key stakeholders including HEA staff/teachers, HEA Board Members, EA Head of School, EA Board President, EA Director of Institutional Advancement, EAPA President, HGP Board Chair, HGP ED, Head of School at Overbrook Educational Center, funders, representatives from Horizons National and others (17 interviews in total, 30-40 minutes each)
- Qualitative analysis (360 references identified falling into one of three main subject areas with 13 emergent themes)
- Horizons National Strategic Plan 2022-2025
- Horizons National Equity, Diversity, and Inclusion Framework

Process:

The Strategic Planning task force planned, prepared, and executed this plan. Committee Chairs reviewed the 2019 HEA Strategic Plan and incorporated survey and interview guiding data and strength-based messaging to develop draft committee objectives. At our January Strategic Planning Mini-Retreat, Committees presented their strategic objectives, short term priorities and long-term goals as part of an open forum for review and discussion facilitated by Ayinde Tate. HGP ED Kathy Jacoby and Jose Oromi from Horizons National served as external reviewers of these priorities throughout the process. To complete the process, the Strategic Planning task force summarized what we learned and prepared a draft plan which was reviewed and approved by the HEA Board in March of 2023.

Output:

We are pleased to deliver the HEA 2023 Strategic Plan: 2023-2026. The strategic plan provides an organizational framework and key priorities to continue HEA's growth and operations for the next three years, 2023-2026.



Program Committee

Strategic Objective

To provide high-quality core (K-8) programming that creates opportunities for HEA students to build the confidence, knowledge, and skills they need to develop their own successful futures

Short Term Objectives

- Perform annual review of core programming, attendance/retention rates, and student assessments in math and literacy with the goal of meeting or exceeding Horizons National's annually reported milestones; report results to the Board
- Provide resources and staff support to foster optimal Social Emotional Learning (SEL) programming for students and families in every grade
- Evaluate addition of any new impact measures to incorporate in school year tutoring program assessment
- Strengthen the Middle School program, with a special focus on engagement and high school preparedness, using a process of continuous quality improvement; consider implementation of personality testing in MS and HS to advance career exploration
- Offer new parent/family-centered programming based on feedback from HEA caregivers

Long Term Goals

- Continue annual review of core programming, attendance/retention rates, and student assessments in math and literacy and report results to the Board
- Work with the Executive Director and Program Director in standardizing summer and year-round programming to maximize summer academic gains and to foster a strong sense of community within HEA
- Offer additional parent/family-centered programming to be held at EA, partner schools and/or virtually based on feedback from HEA caregivers; seek to develop stronger ties with HEA families and communities based on caregiver and partner school feedback

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- Support the Executive Director and Program Director, as needed, in creating effective strategies for diversifying staff recruitment and innovative staff training opportunities

High School Program Committee

Strategic Objective

To solidify an impactful and sustainable HEA High School (HS) Program that demonstrates HEA's long-term commitment to our students and families as they strive toward 4 year high school graduation and future success

Short Term Objectives

- Work with Executive Director and HS Program Director to develop engaging year-round and summer programming opportunities that maximize academic gains, build community and support HS graduation attainment in 4 years
- Define and track core outcome measures for student progress and overall HS program impact (e.g. retention/attendance rate; 4 year graduation rate; employment upon graduation or matriculation into trade school, community or four-year college; qualitative student/alumni/caregiver feedback through interviews/surveys)
- Support Middle School students and families in HS application process with a goal of achieving admission into one of top three regional high schools
- Strengthen partnership with College Possible and investigate additional relevant partnerships for academic and mentorship support (e.g. Heights Philadelphia, Summer Search, etc)
- Explore mentorship/internship opportunities as well as other affiliations with local businesses, trade schools and colleges to enhance out-of-school HS student experience, exposures, and career exploration
- Develop alumni network and programming for students and families to remain connected to HEA while working with College Possible (or other partners) in HS and post-graduation



Long Term Goals

- Support Executive Director and HS Program Director to refine operational details/formal curriculum for HS program using a process of continuous quality improvement
- Standardize and track core outcome measures for HS student progress, overall program impact and alumni updates and report to board
- Evaluate new and existing partnerships/affiliations and research additional opportunities on an annual basis
- Enhance alumni network programming and support new ways to further alumni engagement (e.g. HEA Ambassadors)
- Explore viability of a Regional Horizons High School program

Governance and Nominating Committee

Strategic Objective

To strengthen Board practices and composition to ensure continuity, succession, stability and engagement

Short Term Objectives

- Review and recommend updates to existing Board documents and engagement expectations
- Record unwritten Board policies and officer roles
- Develop succession plan for future Board leadership, taking steps to recruit and prepare future Officers and Committee Chairs
- Create a pipeline of potential new Board members with a focus on diversity of perspectives/experiences and skill sets; recruit participants from EA lower school, our local community, and HEA caregivers/alumni; explore ways to further engage HEA caregivers

Long Term Goals

- Reevaluate Board leadership succession planning annually
- Update and strengthen Board matrix to assess current and anticipated needs related to Board composition with a focus on diversity of perspectives/experiences and skill sets
- Maintain updated Board documents, policies and orientation materials
- Identify potential Board member candidates and explore their interest and availability for Board service; encourage Committee involvement as a stepping stone for Board Membership (except for Governance and Executive Committees)

Marketing Committee

Strategic Objective

To establish a marketing strategy that communicates and increases awareness of the HEA mission to accelerate learning recovery, allowing all students to build skills that will support them on their path to economic stability and personal wellbeing

Short Term Objectives

- Update brand consistency and branding standards across all materials always employing a strength-based messaging approach; utilize student/family/teacher storytelling to highlight the impact of Horizons' out-of-school learning
- Update materials and website to showcase HEA new Mission statement
- Support and promote Horizons Heroes and HEA fundraising events
- Partner with EA to increase school-wide awareness of HEA

Long Term Goals

- Continue to promote Horizons updated branding and strength-based messaging

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- Strengthen Horizons communications and marketing strategy within the EA community and locally
 - Provide feedback to Executive Director and marketing assistance with maintaining an updated HEA website
 - Monitor and evaluate the effectiveness of all marketing efforts

Fundraising Committee

Strategic Objective

To strengthen, diversify and expand HEA's funding sources to ensure the sustainability and future growth of the program

Short Term Objectives

- Find additional education funders (foundations, corporate grants) for the general program and to support growth of school year tutoring, SEL efforts, and High School program
- Engage existing and new foundation and corporate donors through informational programs (virtual or in-person), summer volunteer opportunities, and 8th grade graduation reception
- Refine and build on the Horizons multi-year commitment strategy (currently named Horizons Heroes) for individual donors
- Evaluate and revise fundraising efforts with focus on specific HEA initiatives; increase awareness of program among lower school families at EA; consider initiative to engage HEA students/families to participate in a giving campaign or fundraiser



Long Term Goals

- Evaluate and revise fundraising efforts with focus on key HEA initiatives; support all Executive Director fundraising efforts
- Continue to attract balanced and diversified funding sources considering the annual allocation amount of HGP funding
- Maintain a six-month operating budget cash reserve to cover a potential economic downturn which might impact annual fundraising
- Review fundraising tracking and technology needs
- Cultivate both new and sustained donor support for the program, with a heightened focus on recurring/multi-year commitments
- Continue to coordinate fundraising efforts with EA Advancement Office through the Executive Director


Finance Committee

Strategic Objective

To oversee the financial operations and fiscal health of HEA

Annual Objectives

- Create succession plan, in concert with the Governance Committee, to ensure Board includes members with strong financial skill set
- Prepare a three-year plan to ensure adequate fiscal health in the event of economic instability and update annually
- Review annual budget allocation from regional site, Horizons Greater Philadelphia (HGP)
- Review EA allocations and in-kind donations

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- Monitor the financial status of HEA on a quarterly basis and oversee financial information provided to the Board of Directors by the Executive Director
 - Provide support on the financial impact of potential new program initiatives to the Executive Director and working Board Committees
 - Monitor program reserve considering best practices across the Horizons network and in partnership with HGP; review how program reserves are being invested by EA
 - Review cost per student annually and benchmark with HN and HGP programs

Executive Committee

Strategic Objective

Provide advice and guidance to both the Board Chair and Executive Director of HEA

Annual Objectives

- Serve as a “Think Tank” for both the Board Chair and Executive Director, assisting with strategic decisions and contributing guidance during organizational challenges
- Develop and oversee succession plan for Executive Director
- Provide support and counsel to the Governance and Nominating committee
- Monitor HEA’s Strategic Planning document on an annual basis; assess progress and determine timing/need for initiating a new Strategic Planning process
- Work with Executive Director to support streamlined succession planning process for HEA leadership; oversee creation of an Executive Director Search Committee on an as needed basis

List of Board Membership and Board Observers

Officers

Bonnie Lo, Chair
Laurie Collins, Vice Chair
Ellen Blommer, Treasurer
Karen Marston, Secretary

Trustees

Donna Archambault*	Margaret Hondros*
Lorraine Brown	Muniya Khanna
Theresa Clark-Rihn	Ann Kraftson '85
Donna Corrato	Jen Lederman
Beth Corrigan*	SooHee Lim
Yamini Durani	T.J. Locke
Jennifer Franklin	Mike Morgan
Tamika Gamble	Nina Rogers
Beth Hanssens	Ann Semmer*
Kim Harrar*	Mallory Silva
Peri Higgins*	Alisha Slye
Beth Hixson	Holly Stanley
Brenda Holston	Mohammed Toure '12

*Trustee Emeritus

Board Observers

Jen Fifer, Director of Institutional Advancement, Episcopal Academy
Ryan Learn, Program Director
Ayinde Tate, Director of Diversity & Inclusion, Episcopal Academy
Lisa Herbster, Assistant Head of Lower School, Episcopal Academy
Zack Walker, Director of Financial Operations & Accounting, Episcopal Academy

List of Committee Chairs and Members

Program Committee

Holly Stanley, Chair	Yamini Durani	Mike Morgan
Ellen Blommer	Tamika Gamble	JoAnne Hopkins (Non Board Member)
Laurie Collins	Brenda Holston	Ryan Learn (Non Board Member)
Courtney Delaney	Beth Hixson	SooHee Lim
	Karen Marston	Bonnie Lo

High School Program Committee

Alisha Slye, Chair	Mike Morgan	Dee Adeyemo (Non Board Member)
Laurie Collins	Bonnie Lo	Julie Laine (Non Board Member)
Courtney Delaney	Jennifer Franklin	Ayinde Tate (Non Board Member)
Muniya Khanna		

Governance and Nominating Committee

Karen Marston, Chair	Bonnie Lo	Mallory Silva
Laurie Collins	Courtney Delaney	

Marketing Committee

Donna Corrato, Chair	Ann Kraftson	Mallory Silva
Laurie Collins	Jen Lederman	Holly Stanley
Courtney Delaney	Brenda Holston	

Fundraising Committee

Jen Lederman, Chair	Courtney Delaney	Jennifer Franklin
Melissa Trala, Chair (Non Board Member)		Bonnie Lo
Lorraine Brown	Nina Rogers	Jen Fifer (Non Board Member)

Finance Committee

Ellen Blommer, Chair	Bonnie Lo	
Courtney Delaney	Mohammed Toure '12	
Beth Hanssens	Zack Walker(Non Board Member)	

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