



McCALLIE

— HONOR TRUTH DUTY —

STRATEGIC PLAN

Man's Chief End is to Glorify God and to Enjoy Him Forever.

In 1905, brothers Spencer and Park McCallie opened a college preparatory school for boys on the site of their family farm. Committed at its founding to academic excellence and to the glory of God in Christ, McCallie would, throughout the century and next one, thrive and grow with its clear identity and compelling mission. The school's motto -- **Man's chief end is to glorify God and to enjoy Him forever** -- and the words "Honor, Truth and Duty" continue to anchor and direct the school, as we now chart an aspirational course for the upcoming season in the life of the McCallie School.



HONOR • TRUTH • DUTY

McCALLIE



No institution in the world
understands boys better
than McCallie does, and
no one transforms boys
into men like we do.



To the McCallie Community,

Never before in our country's history have boys more needed to be inspired, mentored and transformed than they do right now.

McCallie's enduring commitment to **Honor, Truth and Duty** calls boys to noble ideals that are vital yet uncommon in today's world; ideals that will equip and incline them to serve and lead, to glorify and enjoy God, and to make a positive difference in their world.

McCallie stands apart in a time when boys and young men are underperforming, disengaging and adrift. Our boys, though, thrive in a community that guides them toward strong character, intellectual

rigor and innovative mindsets, helping them develop vital tools in the pursuit of excellence and achievement while remaining humble and service-minded. They flourish and become their best selves amidst close relationships with their teachers and deep **brotherhood** with their peers.

Among our country's pre-eminent independent schools, McCallie is uniquely poised to offer boys the most relevant and powerful opportunities for their learning and growth. We can, and should, boldly assert ourselves as the **national leader and model** in how boys should be mentored and inspired intellectually, spiritually, socially, emotionally and physically in their journey to manhood.

Even as we build upon our rich history and traditions, we join the rest of humanity looking over a world that moves faster than at any time in history, and we are challenged: How do we retain the values that brought us with strength to this time while also being able not only to survive in the 21st Century, but to thrive?

To not simply exist, but to go beyond; to not simply prepare boys for college, but to prepare them for life in a world that will push them in ways previously unimagined; to not simply teach boys important values, but to empower them to live those values; to not simply know of God, but to know God; to not simply describe the world, but to provide boys the tools to shape it for the betterment of all people: This is the calling before McCallie.

In order for McCallie to fulfill this calling, it is crucial that we set a course for our school that reflects our unique character and our desire to lead on a national and international scale. It is essential that we produce boys who will thrive and lead as scholars and citizens in **a dynamic and**

diverse world that, more than ever, needs men of character and courage, men of strength and purpose, men who embody the ideals of Honor, Truth and Duty. **In short, the world needs McCallie men, and our world needs McCallie.**

The strategic plan that follows is the McCallie community's declaration of a path forward to fulfill that calling. It is bold and aspirational, worthy of our past, essential for our future. It is what current and future McCallie boys need and deserve.

The plan is the synthesis of thousands of data points from alumni, parents, students and faculty, all gathered during a year of extensive surveys, research and focus groups; faculty and Board retreats; visits to outstanding schools around the nation; benchmarking and analysis; challenging work with nationally-recognized consultants; and countless conversations about what it is that makes McCallie McCallie. The plan truly represents the collective aspirations of the McCallie community.

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It is built on four foundational commitments that have been at the heart of McCallie's mission since our founding more than a century ago, and which continue to drive and define us. The plan carefully blends tradition and innovation; it looks back while it leans forward.

From those commitments, the plan draws out six strategic imperatives — points of focus that are central to McCallie's work to be a school that thrives and grows its impact and effectiveness. These imperatives are the result of more than a year of concentrated work by members of the **McCallie community**, from alumni and current students, to the parents, faculty and administration and longtime friends of McCallie, all with the support and approval of the Board of Trustees.

The plan itself outlines tactics designed to advance the imperatives that were based on the work of the campus community as well as the Board in determining the steps that are most critical to meeting the imperatives. As the school makes progress, these tactics will by definition evolve and change, but these imperatives provide a blueprint from which these lofty imperatives can become tangible results.

As you read this plan, keep in mind that every person in the McCallie community — from alumni and parents to faculty and staff and even our students — will make vital contributions to our success in meeting these imperatives.

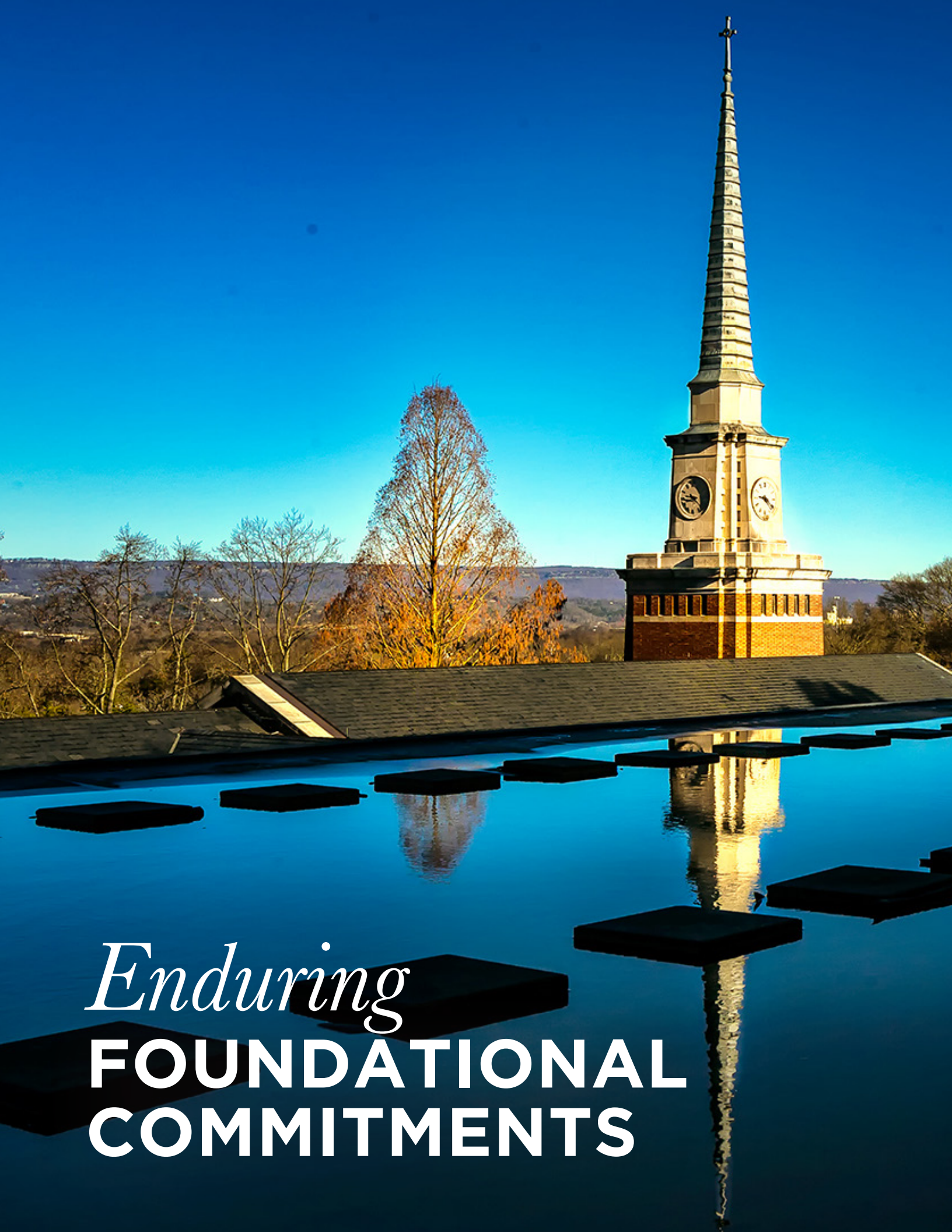


A. Lee Burns III '87
Headmaster



J. Hal Daughdrill III '73
**Chairman
Board of Trustees**

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Enduring
**FOUNDATIONAL
COMMITMENTS**

The background of the slide features a photograph of a swimming pool with a blue overlay. The pool is in the foreground, and the background shows some trees and a clear sky. The blue overlay is a semi-transparent rectangle that covers the right side of the image, providing a backdrop for the text.

McCallie Reaffirms Our Commitment:

- To our identity as an independent, college preparatory school serving only boys.
- To serving both day and boarding students with vibrant programming.
- To our Christian foundation and principles and our Judeo-Christian heritage and tradition, while being welcoming to and respectful of boys and families of other faith traditions.
- To character development and to the ideals of Honor, Truth and Duty.



The
**STRATEGIC
IMPERATIVES**



A Note About The Strategic Imperatives:

These strategic imperatives provide general direction for McCallie for the upcoming years, though the plan allows for some flexibility in terms of how and when to implement the tactics. The school and Board of Trustees recognize that securing the necessary resources will also shape the implementation and timing of the plan. Finally, the school recognizes that, in a dynamic world, we must maintain a strategic posture and the ability to adapt.

TEACHING & LEARNING

STRATEGIC IMPERATIVE #1

Redesign and rebalance the curriculum and programs to align with the knowledge, skills, habits and mindsets most vital to thrive as scholars and leaders.

Rationale

- To equip boys to thrive and lead in a dynamic world.
- To deepen learning.
- To emphasize teaching methodologies that are especially engaging for boys.

Tactics and Opportunities

- Expand the emphasis on critical thinking; creativity and design; innovation and entrepreneurial thinking; collaboration; communication; cross-cultural competencies; programming/coding; and social and emotional intelligence.
- Offer more flexible, experimental and deeper learning experiences.
- Provide students with the time, space and encouragement to reflect and lead lives with balance and integration.
- Provide faculty the time and training, incentives and leadership opportunities to design new and rich learning experiences.
- Construct an Upper School academic building to support new curriculum, programs and approaches to teaching and learning.



This imperative is at the heart of our educational mission and reflects our goal to prepare boys to thrive and lead in a dynamic world.

By focusing on how to redesign and rebalance McCallie's curriculum to be optimized for the boys we teach, our students will gain the knowledge, skills, habits and mindsets vital to their success as scholars and leaders.

FACULTY TALENT & DEVELOPMENT

STRATEGIC
IMPERATIVE

#2

Support generously and encourage the professional growth, leadership, and innovativeness of the current faculty, and give primacy to attracting and retaining the next generation of world-class teachers who match and exceed our missional expectations.

Rationale

- To ensure boys have an outstanding faculty whose teaching, mentoring and relationships will have a direct, profound and positive impact on them.
- To keep great teachers in the teaching ranks, recognizing that teaching and mentoring students is the most important activity at McCallie.

Tactics and Opportunities

- Recruit nationally for faculty and administrators, especially the candidates who excel as teachers, coaches, advisors and dorm parents.
- Structure a staff role to prioritize recruitment, hiring and human resources.
- Implement a faculty compensation system that incentivizes excellence and leadership.
- Enhance faculty and staff compensation (salaries and benefits) to range from competitive to highly competitive in the local and national NAIS markets and compensate appropriately in relationship to performance and alignment with McCallie values, culture and direction.
- Foster a culture that encourages and empowers the faculty to share their ideas, have opportunities for advancement and leadership, and play an active role in shaping the school.
- Increase the quality and frequency of evaluation, coaching and professional development that teachers receive.
- Provide attractive and additional faculty housing options.
- Offer assistance or educational options to on-campus faculty with young children so these children can attend strong elementary schools.



This imperative centers on the need to support McCallie's faculty and encourage their professional growth, leadership and innovation. Good teaching is the heart of good learning, and the relationships boys build with their teachers are the heart of the McCallie experience.

By attracting and retaining the next generation of world-class McCallie teachers, we lay the foundation to continue McCallie's history of exceptional teaching and mentoring.

PROGRAM EXCELLENCE

STRATEGIC
IMPERATIVE

#3

Assure every student can participate in outstanding co-curricular and extracurricular programming (arts, athletics, clubs, activities and specialized learning) to promote the development of character, physical fitness and essential life skills as the boys discover and pursue a range of interests and passions.

Rationale

- To foster the holistic development of our boys through diverse activities and programs.
- To give boys many options to pursue excellence outside the academic curriculum.
- To seek and achieve balance as a school.

Tactics & Opportunities

- Increase our commitment to fine arts programs and facilities.
- Provide more annual funding and recognition for activities.
- Add intramural athletic opportunities for boys of all abilities.
- Increase programs and opportunities for lifetime fitness, wellness and strength conditioning.
- Develop and publicly articulate an athletic philosophy and strategic vision that ensures that our athletic programs are excellent, that they are an extension of our educational mission, and that athletic success is well defined.
- Enhance and introduce programs and facilities (e.g. golf and crew, programming and engineering) that will excite, attract and retain outstanding boys.
- Explore possibilities for further enhancing our relationship with Girls Preparatory School.
- Construct an athletic and fitness fieldhouse that includes spaces for lifetime fitness, strength training and a practice turf field for use by numerous teams.
- Construct boy-friendly and unique recreational facilities that differentiate McCallie.
- Enhance McCallie's outdoor program to continue to encourage a lifelong appreciation for outdoor activity.



This imperative aims to ensure that every McCallie student has the opportunity to participate in excellent co-curricular and extracurricular programming.

From developing fine arts programs that rival those of many colleges and universities to an athletics program that emphasizes the development of the whole boy, McCallie's programs will provide outlets for boys to grow in character, fitness, confidence and other areas vital to their success in life.

ENROLLMENT, STUDENT TALENT & COMMUNITY

STRATEGIC IMPERATIVE #4

Increase the number and diversity of applicants and achieve the ideal size of approximately 300 boarding students, 300 Upper School day students and 275 Middle School students.

Rationale

- To attract and enroll mission-appropriate boys who are bright, talented and of good character.
- To further enhance the sense of community.
- To strengthen the boarding and day programs.

Tactics & Opportunities

- Expanding the numbers of boarding students from 250 to 300.
- Increase the size of Honors Scholars program to approximately 100 boarding students, and begin a Day Scholars program.
- Offer a robust financial aid program that supports our key enrollment objectives and is consistent with growing our financial sustainability.
- Develop and implement a specific strategy for attracting Hispanic students.
- Continue our progress in attracting a diverse student body.
- Grow the number of qualified applicants through a stronger value proposition and enhanced marketing with more research and robust video and social media strategy.
- Renovate Belk Dorm; renovate and/or re-purpose Hutcheson Dorm.
- Build a new dormitory.



This imperative is focused on ensuring that McCallie's student body is reflective of the school's mission and aspiration to be a national leader in boys' education.

We will enjoy the strongest sense of community and brotherhood by reaching our optimal size, increasing the number and diversity of applicants, and growing our financial aid and scholarship programs.

PUBLIC PURPOSE

STRATEGIC IMPERATIVE #5

Leverage our resources, relationships and reputation to serve the broader community as part of our duty to have a public purpose as a private school.

Rationale

- To serve and help others who could benefit from our expertise and experience.
- To foster in boys the impulse to see and meet the needs of others.
- To expand on our current know-how and make McCallie the leader that knows boys and how they learn.

Tactics & Opportunities

- Partner with and foster the National Center for the Development of Boys to equip educators, parents and others with research and best practices in raising, educating and mentoring boys.
- Expand opportunities to involve our students in community service learning.
- Offer youth club sports programs on our campus for the Chattanooga community.
- As a school and/or in partnership with the National Center for the Development of Boys, explore potential partnerships that could benefit McCallie and the community.



This imperative highlights a core philosophy: that McCallie, as an independent school, must serve a public purpose. McCallie's unmatched expertise and experience in teaching boys is something that our school can share locally and nationally.

As a school, we also recognize that our future is intertwined with that of Chattanooga. When we take steps to partner meaningfully with our community, it makes our school and our city better.

FINANCIAL SUSTAINABILITY & AFFORDABILITY

STRATEGIC IMPERATIVE #6

Secure the strength and sustainability of the school, including access and affordability for a range of families.

Rationale

- To ensure the continuous and upward arc of McCallie.
- To enable McCallie to achieve our strategic goals and fully implement our mission.
- To allow us to continue to plan with aspiration and boldness for the future.

Tactics & Opportunities

- Launch efforts to increase McCallie's endowment for merit-based scholarships, tuition assistance, faculty compensation, and professional development.
- Enhance the school's multi-year financial model that generates balanced budgets with appropriate contingencies, incorporating focused efforts on cost controls, operational efficiencies, sunseting of programs and new non-tuition revenue streams.
- Continue the long established pattern of Board oversight and stewardship of the prudent management and disciplined deployment of all financial reserves.
- Double annual operating support for the Honor Fund, to include new restricted funding efforts and significant growth in the percentage of participation in annual giving by alumni and parents.
- Energize the Long Blue Line by deepening the connection and commitment to lifetime engagement and relationships with our alumni.



The success of every other initiative in this plan will depend not only on the hard work and innovative thinking of the McCallie community, but also on the resources available to put these plans into practice.

This initiative focuses on a significant effort to increase McCallie's endowment through fundraising while also continuing the school's tradition of prudent financial decision-making. Combined, these steps ensure that McCallie is positioned to thrive in the years to come.





*The McCallie Strategic
Planning Committee*

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