



OFFICE OF THE HEAD OF SCHOOL

Annual Report 2017-2018

**Prepared for the Trustees of Church Schools
In the Diocese of Virginia**

September 2018

General Observations

This year, we worked with the Marshall Advisory Group to formulate a strategic plan that will serve as our roadmap for the future. The initial situational assessment, including a detailed analysis of foundational strategies, brand messaging, admissions procedures, financial performance, current and proposed programs, as well as strengths and weaknesses, highlighted specific challenges to address for the continued success of St. Margaret's School. The focus was twofold: to address immediate challenges followed by identifying and setting longer term strategies for sustainable growth and success of the school. Through this analysis, we developed four goals:

- Promote/communicate revised mission and vision
- Grow enrollment and strengthen financial position
- Increase success of the Wheat Center Program
- Launch successful Thrive Post Graduate Program

Once the Board of Governors accepted this plan in the spring, we developed an implementation plan including tactics, timelines, deliverables, and responsibilities. This implementation plan is the primary tool for management, tracking, and reporting progress to both our internal leadership team and our Board of Governors.

At this point, we have promoted our revised mission and vision statements and are examining all our policies, procedures, and expectations to see that they are aligned with our mission and vision. To grow enrollment, most of our focus is on deepening relationships with preferred consultants, utilizing our alumnae and parent network, and generating referrals from target feeder schools. We continue to promote the value of the Wheat Center Program to appropriate students and their families. To expand our services within the Wheat Center, we are partnering with the Faison Center in Richmond to better serve the needs of girls with autism. Faison's educational professionals trained our faculty and staff and will serve as resources to us, the girls with autism, and their families. We launched Thrive, another example of expanding our services. Thrive is a postgraduate or gap year experience for those girls who are not ready for college. This program enables a girl to design her own course of study in five areas: academic, experiential (internships or independent study

projects), travel, leadership, and well-being/college application process. To support the Wheat Center Program, the Viola H. Woolfolk Center, has been completely renovated to include lowering the stacks to optimize natural light, upgrading the technology to include easy accessibility to electricity and internet, and new light weight, flexible furniture for girls to study independently or collaboratively. We also repainted and recarpeted the entire space in our school colors, blue and grey.

Although we began working this plan as we formulated it, we look forward to a complete recruiting cycle with our plan as our guide. It will not only focus our work internally, but enhance our fundraising efforts.

Enrollment Management - Admission

We started the fall recruiting season with no turnover in our office and in January, 2018 replaced our Admissions and Financial Aid Coordinator. We also added an Admission Communications Coordinator to our admission team which was extremely helpful managing outbound communication. This summer we welcomed Bowdre Fortson '09 back as Associate Director of Admission. She will replace Catherine Murphy who will be moving on in late September 2018. Bowdre was Associate Director of Admission 2014-2015 and we are thrilled to have her back.

At the opening of school 2017, we welcomed 36 new students making our opening day enrollment 108 - 25 day students, 79 7-day boarding students and 4 5-day boarders. Of the boarding students, 37 were international and 42 domestic. Our domestic students represented 10 states plus the District of Columbia. Our international students represented the 8 countries of Dominica, Mexico, China, Vietnam, India, Rwanda, Papua Indonesia and Cayman Islands. We welcomed two girls from Chile through our exchange program for our first trimester. Our international population continued to bring in the largest amount of revenue with \$1,357,500 in comparison to \$980,100 for domestic boarding students (7 and 5-day) and \$251,400 for our day students. A total of two domestic boarding students enrolled after the opening of school, one of which was a full pay 5-day boarding student.

Our opening day discount rate was 42.24%, down from 44% the year before.

Mexican enrollment continued to be tenuous. We had five Mexican students but only one was full pay. We are excited to be welcoming one of our Mexican students back for the 2018-2019 school year.

The admission team continued to foster relationships with domestic and international consultants, feeder schools, alumnae and friends of St. Margaret's all along their travels this year. Throughout our travels we promoted our Legacy Scholarship and Book Award Scholarships. We attended the IECA Conference in November and April, two School Connections events, as well as SBSA, hosted by Stuart Hall, which was a wonderful event.

Admission hosted several large events on campus during the school year. This included two consultant group visits in the fall, two open houses, and the accepted student overnight. All events were successful and very well attended.

This was the first year we attempted online enrollment through onBoard and as a whole it went fairly well. We worked to ensure our online contracts met all legal requirements and that communication was clear to families regarding the process.

With regards to retention, we continued to make this a focus during adviser and Student Affairs meetings. We retained one of our Mexican students which was a great success, but failed to retain 9 other students (not including the Mexican students) who intended to stay only one year. The reasons these students moved on to other schools was varied and there was not one consistent theme.

Travel included the Grand Cayman, Jamaica, Bahamas, Vietnam, South Korea, United Arab Emirates, Saudi Arabia, Mexico, Texas, North Carolina, Connecticut, Massachusetts, New Jersey, New York, Georgia, Maryland, South Carolina, Kentucky, Ohio, Florida, Alabama, Illinois and, of course, throughout Virginia. We attended the Girl Scout Convention and set up a table to spread the word about St. Margaret's to as many of the 10,000 attendees as possible. We chose not to return to China last year and have decided to make two trips this upcoming year.

Jackie Montero has been working on establishing our relationship with Faces and Our Cultures Program for students from Guatemala to visit schools in the US as an exchange program. We are thrilled to welcome one of their students to campus this fall and look forward to a long-standing relationship with them. We will receive a small stipend for this student, but the ultimate goal is that these girls are a good match for St. Margaret's and return as full year, tuition paying students.

We are looking forward to a successful upcoming school year and recruiting season using our new Strategic Plan as a guide and armed with new programs we hope will attract even more wonderful students to St. Margaret's.

Faculty and Staff

We hired a one new teacher for full time positions in the following subjects: Mathematics, History and Spanish and also hired an Assistant to the Athletic Director to replace an intern. We hired a science teacher who took over the role of the Coordinator of the River program which includes exploring partnerships with external constituents along with teaching science and running the afterschool river activity, and hired a part time music and drama teacher. On the staff side, we hired an experienced senior Marketing and Communications director and towards the end of the year added another marketing and communication team member. We retained the Marketing and Communication intern from last year shifting her role to a marketing and communication/admissions staff member. We hired an alumna for a full time position as a residential hall adult/evening and weekend hall duty member and employed the spouse of the River

Program Coordinator on an hourly basis to supervise evening study hall in the residence hall where she is living. We hired another alumna to fill the school nurse position. The Math, Science, Director of Marketing, and marketing/admission hires lived on campus.

We addressed staffing efficiency by replacing two History teachers who chose to move on with the one new hire plus the use of staff who taught in other departments but had the requisite background to each teach a course in the History department. We also reduced the Music/residential full time position to a part-time position and staffed the residential position with the full time residential alumna. These hires allowed for continued operation of 5 weekend duty teams of 5 members, the same as last year, and with the same number of residence hall staff as the previous year, continuing to follow that staffing efficiency model. Likewise in academic classes, except for the Wheat Center classes that are designed to be small, with self-sustaining enrollment, the average class size for the Core and Intermediate skill building classes ticked upwards. We were able to maintain the staffing reduction from the previous year in each content area from 3 to 2 ½ full time teachers except for in Math and English where we saw a slight increase in class sections at the upper level. Our academic curriculum was built to accommodate our great diversity of students, one of our greatest strengths and a critical element of our mission. The present staffing situation stretches the faculty in some key areas, but we were able to maintain the integrity of our program.

Education Programs and Student Life

We continued to develop our programs through the Wiley H. Wheat Center for Innovative Learning. The center offers support (labs, tutoring, test preparation), enrichment (online upper level courses, independent study opportunities) and community enrichment (tutoring and adult education). We concentrated on those internal programs that bring revenue this year.

Students enjoyed our popular electives including Robotics, Personal Finance, and Moral Ethics. Through One Schoolhouse, the online school for girls, we were able to offer additional courses for recommended students in AP Computer Science, AP Psychology, Engineering, and Forensic Science.

A senior completed an independent study project under the supervision of our River Program Coordinator. She studied the effect of the habitat on the bird population at Menokin, a fascinating local historic preservation site. She presented her findings to the Menokin Board and wildlife and inland fisheries representatives.

During Minimester 2018, students participated in theme-based courses including *Next Steps* (the college application process), *It's a Mystery to Me* (investigating crime scenes and using forensic science principles), *Art Mission* (studio art combined with gallery tours with the Kon-Kons), *History/Science Theatre* (movies across the curriculum from multiple perspectives), and *Behind the Wheel Drivers Education* (including car maintenance and safety workshops). Our students enjoyed the opportunities to really delve into a topic from multiple angles.

Our minimester trip took students to New York City where they visited the Metropolitan Museum of Art, the Museum of Modern Art, The American Museum of Natural History, the New York Public Library, the Empire State Building, St. Patrick's Cathedral, Ellis Island and the Statue of Liberty, Wall Street, the 9-11 Memorial, Central Park, and Times Square.

Twenty-two seniors completed and shared their Independent Study Projects (ISP) in a variety of careers including researching and providing production support for CBS's *Face the Nation*, conducting sea turtle conservation in Costa Rica, and learning the ropes in Hollywood at STX Entertainment. Each girl gave a 10-12 minute presentation to the school and turned in a journal. All seniors are required to complete an ISP presentation or a senior speech.

In the fall, three seniors participated in the annual math team competition at Rappahannock Community College and placed second out of 17 teams. In the spring, our mathletes participated in the individual math contest at RCC and came home with first place medals in Algebra I and Geometry. 172 students from 18 schools participated in four subjects.

St. Margaret's welcomed Mac MacDaniel from Quill Theatre in Richmond again last year on Shakespeare's birthday to meet with English classes, keep the Bard's memory alive, and share a cake at lunch. Department Head, Shannon Spears, hosted the party.

Our International Program Director, Lesley Newman '99, led the girls' preparation of the International festival which was a colorful, boisterous interactive sharing of dances, fashion, art, games, music, languages, traditions, and food from their countries.

Duane Sanders, Our River Program Coordinator, planned and led our traditional weekend river trips by class. Students enjoyed outside activities such as kayaking, hiking, paddle boarding, biking, and ropes courses during weekends and after school. Our students participated in water quality testing for DEQ, oyster restoration, eco-tour and nature trail development and campus sustainability initiatives. Partnerships in progress include Essex County Parks and Recreation, Essex Rotary, Friends of the Rappahannock, and Menokin Foundation.

Our rain garden was revitalized by faculty and student volunteers in honor of Mollie Conklin, a former teacher and college counselor. The plantings and soil amendments reduce runoff, turbidity, and promote a healthy river basin. In addition, the flowers attract pollinators and beautify campus.

We hosted Essex Museum's "River Then and Now" educational program for local public middle school students on our riverfront and our students served as guides.

Our first Aim High even was a big success. Students, faculty, and members of our Board of Governors, and other guests had the opportunity to learn from an esteemed group of women who lead in defense of our country.

Green Team hosted monthly Blue Grey food waste challenges to educate students and staff about the importance of decreasing food waste and living an eco-friendly lifestyle. In addition, Green Team hosted an Earth Day program. Dr. Donna Marie Bilkovic, Research Associate Professor at VIMS, spoke on the effects of chemicals and pollution in the Chesapeake Bay. Her research on the effects of coastal development has led to substantive changes in how shorelines are managed.

Our winter drama production, *Annie Junior*, involving about 40 actresses and back stage crew members, was a great success. Beth Harvey praised the production as a student run affair. Two performances attracted many community friends in addition to our own students and teachers.

Members of the Treble Choir performed a selection of numbers at the Rotary Club fundraiser, "Keys to the Heart, The Return." Proceeds benefited local charities. They also led a singing worship service at St. John's Episcopal Church in Warsaw, VA.

Six student artists in our Mixed Media class exhibited a stunning collection of self-portraits at the Tappahannock Art Gallery in February and March.

The annual all school field trip took learning outside the classroom to the Virginia Museum of Fine Arts where they learned more about the Terracotta Army exhibit.

With our athletic program's focus on unity, attitude, and striving for excellence, our teams continued to see tremendous success on and off the field. It was another record-breaking year for St. Margaret's athletic program. Volleyball again recorded over 20 wins in a single season. Volleyball also finished second in the LIS (League of Independent Schools) both in regular season and the tournament. The second trimester saw swimming to states. And in the spring, softball took everyone by storm again as they were LIS Regular Season and Tournament Champions for the fourth year in a row. Their season ended with a tough loss in the VISAA state tournament semi-finals. Coach Cynthia Walker was named the 2017 LIS Volleyball Coach of the year for the fourth year in a row. Coach Rob Pierce was named 2017 LIS Softball Coach of the year. One student signed to play sports in college, basketball at Wilfrid Laurier University.

Our girls engaged in many service opportunities. In October, our students helped with the Essex County Homeless Organization's Zombie Walk fundraiser. Our girls worked the stations at the St. John's Church Community Trunk or Treat. In November, our girls assisted Aylett Country Day School in their booth at the Urbanna Oyster Festival and the Middlesex Fire Department's Children's Activities booth. They assisted at St. Stephen's Church in Heathsville for their oyster roast in December. Partnering with St. John's Episcopal Church, our freshman class participated in the Community Living Nativity on St. Margaret's front lawn. Students rang bells for the Salvation Army before Christmas. Monthly, a group of students joined members of Beale Memorial Baptist Church to feed the homeless in Monroe Park in Richmond. Basic Needs, a student club, sponsored a week long Blue/Grey food drive and collected over 400 food items for the Central Virginia Food

Bank. Our students worked with the Fish and Wildlife Service at the National Wildlife Refuge, Hutchinson Tract, on eradicating kudzu, and during the annual Go Wild Event as guides. Students also participated in the Essex County Churches Together's Annual Operation Inasmuch, a community wide service day. In March, a bus full of students traveled to Richmond to walk in the student lead March For Our Lives. In April, students spent the day working for the Menokin Foundation cleaning up dig sites and artifacts collected from previous archaeological excavations.

Spiritual Life

St. Margaret's School is an open and welcoming community that embraces their Episcopal identity and traditions. The students, faculty, and staff take great pleasure in experiencing chapel talks with their peers, singing songs of praise and listening to the choir anthems offered by the Treble Choir. Moreover, the community has adopted as their guiding spiritual principle found in the Book of Common Prayer, the Baptismal Covenant of respecting the dignity of each person regardless of her religion, ethnicity, culture, academic learning style, or sexual orientation. The process of unifying all students from across the globe into a sisterhood that spans a lifetime, infused with the expression of God's love by which our actions are measured, is unique to this institution.

During the year, our student body celebrated Morning Prayer services twice per week and Compline once per week. Additionally, students had an opportunity to explore various worship styles and traditions once per month on Sundays known as Church of Choice. The Holy Eucharist Rite Two service was celebrated on the Opening Chapel for Faculty and Staff, the All School Opening Chapel, St. Margaret's Day, All Saints' Day, Epiphany and Eastertide service. Also, the student body participated in the Ash Wednesday service, Latin Chapel, and Lessons and Carols. One highlight of the Chapel program this year was the visitation of our Diocesan Bishop Shannon Johnston who offered a homily that many students discussed long after he left campus. The second highlight this year was the medley offered by our ever-expanding Treble Choir that is led by Beth Harvey. She leads with enthusiasm and skill that draws out the best from each student. The Choir was invited to attend and offer musical selections to a nearby Episcopal church. Their wonderful performance brought many to tears and joy. Moreover, students who are elected to positions of leadership were installed and received into their position, and all students signed the Honor Book in a Chapel service that is a visual acceptance and vow to uphold the Honor code of the school. As we closed the academic year, we celebrated our seniors into the Alumnae Association of St. Margaret's with a service known as Charms Chapel. Dr. Kristina Odejimi '02 delivered the homily at our final worship service, Baccalaureate. Her message was uplifting and thought-provoking for the seniors who were about to graduate and move forward in college and life.

On several occasions throughout the academic year, several students enjoyed in-depth conversations with Mother Anita regarding their spiritual journey and searched for an understanding of the Divine. There were students excited about creating new worship experiences that highlight the teachings of Christ who wish to present several skits in the coming year and serve as new acolytes and readers. To better assist the student body in their exploration of their spiritual journey, St. Margaret's will

pilot an additional student leader who will serve in the capacity of Assistant to the Head of Chapel. Therefore, in the coming academic year, there will be a Head of Chapel and an Assistant Head of Chapel.

Financial Management and Operations

The 2017-18 total operating budget was \$6.7 million. At the close of the school year 2017-18 our projected deficit of (\$767,960) was a positive \$457,072. The significant improvement in our numbers is largely due to the increased gift from our Foundation. The St. Margaret's School Board of Governors kicked off a fundraising campaign in the fall of 2016 that was very successful raising \$643,122 for our operations. In the fall of 2017, they raised over \$200,000 to add to that amount. Our overall operating deficit has gone from (\$1,115,303) to (\$658,231).

Endowment funds continued to be held by Trustees of the Funds. The market value of the managed funds on June 30, 2018, was \$3 million. Investments held at CSDV totaled \$1.7 million at year end. Loans from the Foundation to the school for the purchase of contiguous property totaled \$287,229. We have a current loan from SunTrust for \$1,000,000 for our athletic complex.

Our day tuition for 17-18 remained \$18,400 and our five day tuition remained \$39,900. The seven day boarding tuition increased by 2.1% to \$48,900. The financial aid awarded in 2017-18 was \$1,920,410 as compared to \$2,067,900 in 2016-17. The discount rate for 2017-18 was 42.5%. The School continues to pay 93% of the employee cost for health insurance and offers employees life and disability coverage at no cost. Our school's contribution to the retirement plan is 7% for those with less than ten years of service and 10% for those with ten or more years of service.

In 2017-18, numerous projects were completed around campus. Four large painting projects were completed, three HVAC units were replaced, a van and new mower were purchased and a large sidewalk project was completed. In addition the renovation to our library began as soon as school ended. The bulk of that project was completed in July and August of 2018. On June 30, 2018 the plant reserve fund balance was \$145,703.

Development

Balancing long term sustainability and the need for immediate cash relief were the top focus in the Development Office for the 2017-2018 fiscal year. In total, St. Margaret's raised \$1,140,582 in combined fundraising efforts including Annual Fund, the Governors Challenge 2, Scholarships, Wheat Center, and other smaller funds.

A generous member of the Board of Governors stepped forward with a \$100,000 matching challenge effort to her peers on the Board to help with the need for cash in hand. In total, the group was able to kick-start last fall by raising roughly \$214,000 in unrestricted giving to the school. While cash in hand still remains a priority, the school wants to be cognizant of overall donor morale and

fatigue and the School knows such a heroic push takes a significant toll on both. For this reason at the Board's encouragement at the winter Board of Governors meeting, the Development team transitioned the fundraising efforts toward the Wiley H. Wheat Center for Innovative Learning. These efforts renovated the Viola H. Wookfolk Library, which houses the Wheat Center, into a state of the art learning center equipped to accommodate the range of varying learning styles St. Margaret's has long supported. In total, St. Margaret's seeks to raise roughly \$600,000 for this project. To date, the School has raised nearly \$400,000 in gifts and pledges.

The other major fundraising initiative remained the Annual Fund. After finishing the 2016-2017 fiscal year around \$426,000, the Development Office set a goal of \$450,000. St. Margaret's is pleased to report that the School surpassed their goal and finished at \$500,333. While the School is encouraged by the overall growth in giving, the unfortunate reality is that a group of key committed board members, alumnae, and friends have increased their giving substantially while overall giving has waned, particularly among alumnae as indicated by the decrease in alumnae giving from 26% to 17%. The Development Office is taking critical steps to work with members of the St. Margaret's Alumnae Board to better engage their peers and encourage them to support the School. The School also saw a drop in parent giving from 76% to 47%. There remains less concern about this drop as parent giving levels were only recently around 20-25% and there is belief that a better concentrated effort to educate and inform parents on the importance of giving can restore stronger numbers. The school was pleased to once again report 100% giving from the Board of Governors and Faculty and Staff.

St. Margaret's continues to promote better alumnae, parent, and friend engagement with a concentrated effort to provide relevant and exciting content on the School while continuing to travel and visit with alumnae and friends of the school both, both individually and in regional events. The School had events in Virginia Beach, Tappahannock, Richmond, Northern Virginia/DC, and Raleigh in the 2017-18 year. The Alumnae Office launched a monthly e-newsletter from the Alumnae Association President to better serve the alumnae body and keep them informed of SMS. St. Margaret's will continue to prioritize engagement through travel and events while simultaneously promoting the fundraising needs of the school.

College Applications and Test Scores

There were 26 students enrolled in the class of 2018 during the 2018-2018 school year. The final graduating count for the Class of 2018 was 24; 25 seniors were on the stage and all received a diploma with the exception of one student who finished degree requirements over the summer. For the 26 girls who completed the school year, they completed a total of 225 applications, averaging 8.6 per student. The senior class received approximately 110 offers of admissions. Ninety-six percent of the graduating class will attend a four-year college in the fall of 2018, and one student will attend a junior college. One student will be taking a gap year to work creatively toward applying for film school in the fall of 2019.

2017-2018 was the 7th year of the dual enrollment partnership between St. Margaret's School and Rappahannock Community College. Thirty Four students earned college credit in 10 courses. Five St. Margaret's teachers are eligible to serve as dual enrollment teachers through Rappahannock Community College. Courses include AP Calculus BC, Honors English, AP English Literature, Honors Physics, AP US History, AP European History, Latin IV and V, British Literature, and US History.

One sophomore, three juniors, and 12 seniors took a total of 25 AP exams earning six 5s, five 4s, nine 3s, and four 2s.

Through individual follow up, the Office of College Counseling gathered scholarship data for the Class of 2018. Eleven seniors earned 40 merit-based awards with a scholarship amount totaling \$497,019. College choices for the class of 2018 included Boston University, College of William and Mary, Randolph-Macon College, The University of Texas, Austin, University of Georgia, Virginia Commonwealth University, and Virginia Tech.

Conclusion, Looking Ahead

We continue to be very, very thankful for the commitment and support of our Board of Governors, our Foundation Board, and Church Schools. Although St. Margaret's faces great financial challenges, we are happy to have our strategic plan to guide our efforts and our wonderful girls to inspire us as we work to ensure the financial success of St. Margaret's School.

Respectfully submitted,



Catherine M. Sgroi
Head of School

St. Margaret's School Statistical Report

As of June 30 at end of FY	2016 - 2017	2017 - 2018	% Change
Students			
Boys			
Girls	123	110	-10.57%
Day Boys			
Day Girls	33	25	-24.24%
Boarding Boys			
Boarding Girls	90	85	-5.55%
Total Students	123	110	-10.57%
Avg. Class Size	9	7	-22.22%
Avg. Combined Jr. SAT	1090	1090	0.00%
Avg. Combined Sr. SAT	1160	1110	-4.31%
12th Grade Tuition			
Day	\$18,400	\$18,400	0.00%
Boarding	\$47,900	\$48,900	2.09%
Financial Aid as % of Tuition	42.96%	42.50%	-1.07%
Day Students % on Financial Aid	88%	65%	-26.14%
Avg. Day Grant	\$10,700	\$11,094	3.68%
Boarders % on Financial Aid	57%	60%	5.26%
Avg. Boarder Grant	\$34,400	\$28,811	-16.25%
EMPLOYEES FTE's			
Instructional	23.9	24.6	2.93%
Administrative Staff	16.4	16.4	0.00%
Other Staff*	12.9	12.5	-3.10%
Endowment (Market Value as of 6/30)	\$3.9 m	\$3.04 m	-22.05%
Income from Endowment**	\$154,732	\$190,873	23.36%
Annual Giving***	\$425,900	\$500,333	17.48%
Total Giving	\$1,545,876	\$1,140,582	-26.22%
% Alumnae Giving	26.0%	17%	-34.62%
Avg. Gift	\$364	\$676	85.71%
% Current Parent Giving	76%	47%	-38.16%
Avg. Gift	\$178	\$261	46.63%
% Fac/Staff giving	98%	100%	2.0%
Avg. Gift	\$227	\$299	31.72%
% Board giving	100%	100%	0.00%
Avg. gift	\$5,398	\$5,797	7.39%
*Includes clerical and maintenance and housekeeping staff			
**Endowment Income(Dividends and Interest)			
***Unrestricted Annual Giving			