



# STUART HALL SCHOOL

CSDV Report 2018-2019

## From Mark Eastham, Head of School 2004-2015

On July 16, 2018, I wrote to Dennis Cross, Chair of the Stuart Hall School Board of Governors, to formally announce my intention to step down as Head of Stuart Hall School at the end of the 2018-19 school year. Little did I know that I was entering the most gratifying year of my Stuart Hall career. It was no coincidence that I chose Stuart Hall's 175th Anniversary year to make this big decision, and I'm happy to say that the positive approach taken toward the transition, when added to the anniversary celebrations, helped create an air of excitement that ran throughout the year.

Our fall "Local Food for Thought" Gala had a record number of attendees, and we raised well over \$200,000 for scholarships. I dare say this was not only Stuart Hall's largest fundraiser, but also probably the largest fundraiser ever in the Shenandoah Valley. Much credit goes to our friend, Buddy Wilton, who once again offered a challenge gift that made the magic happen.

January's Founders' Day celebration was a grand event held in Trinity Church, with all members of our PreK-12 community in attendance, along with many alumni, parents, and friends. There was not a dry eye in the house when our senior class processed in, hand-in-hand, with the youngest members of our student body. For me, this was the culmination of all our work as a community following our merger with Hunter McGuire in 2007.

Following our winter board meeting, Kathy and I were very honored to be the guests of the Board of Governors at a dinner in our downtown building, somewhat overwhelmingly named The Eastham Center. This was especially meaningful because many of those who are helping make the Center a reality were in attendance, either in person or through the magic of technology!

Alumni Weekend was another historic event as we celebrated not only our reunion classes, but all alumni in this 175th year. It seemed especially fitting that former head of school and one of my mentors, Pat Bassett, was named a Distinguished Honorary Alumnus.

A highlight of the year for me was getting to know and work with our new Head of School, Michael Robinson. What a gift it has been to me to be able to work so closely with Michael on a successful transition for our beloved Stuart Hall. Michael and Frances are amazing individuals who will lead this School to even greater heights!



The end of the year was filled with memories that I will cherish, including a chapel for me planned completely by the students, a beautiful Loving Cup Ceremony and Graduation, and finally a "last hurrah" party celebrating the work we have all done over the last 15 years. There are no words to describe how honored Kathy and I feel. What a grand and glorious way to celebrate what has truly been the professional opportunity of a lifetime.

As I said in my letter to Dennis a year ago, there are no words to adequately express my appreciation for having been given this opportunity. Working together as a community, we have accomplished a great deal over the past 15 years. Some highlights are:

- ◆ Merger with Hunter McGuire School to create a PreK-12 day/boarding school
- ◆ Addition of PreK program
- ◆ Addition of boys' boarding and tripling of boarding enrollment
- ◆ Significant B&G improvements, including creation of Davis-Pitt Commons and renovations to Cochran and Robertson dormitories
- ◆ Birth of *Staunton is our Campus vision (authentic learning model)*
- ◆ Purchase of 107 W. Beverley, now The Eastham Center
- ◆ Creation of a robust transportation plan to enhance day market
- ◆ Kickoff of first campaign in more than 25 years
- ◆ More than \$7 million in bequest expectancies
- ◆ More than \$7 million in capital dollars
- ◆ Significant growth of endowment
- ◆ Completion of significant deferred maintenance on both campuses
- ◆ Addition of a school chaplain
- ◆ Formation of a technology vision and addition of Educational Technologist

Stuart Hall is in significantly better shape today than in 2004. The School is confidently poised for the next stage of growth under Michael Robinson's leadership. I look forward to my continued connection with Church Schools through my new role as Secretary and Chief of Staff for the Diocese of Virginia.

Enjoy reading this summary of progress toward our strategic goals over the past year!

Sincerely,

Mark H. Eastham

## Progress on Our Goals in 2018-19

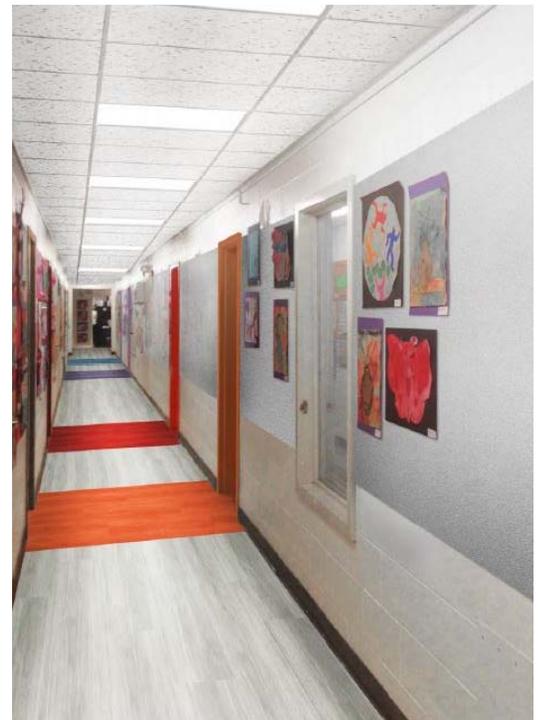
**Goal: Building on our existing distinctive community, we will develop an innovative authentic learning program, utilizing spaces and resources in both the heart of vibrant downtown Staunton and our historic campus.**

- ◆ Selected Tymoff+Moss to develop design for renovation of the downtown building—now designated The Eastham Center in honor of Mark and Kathy Eastham—to serve as a hub for authentic learning experiences. Construction will begin September 1 with the building scheduled to open in Fall 2020.
- ◆ Expanded Ann Snyder's role from Director of Enrollment and Communication to Director of External Affairs to provide administrative support for community connections related to *Staunton is our Campus* vision.
- ◆ Conceived and launched *Project Max—Maximizing our Curriculum through Futuristic Technology*, thanks to a gift from a generous donor, with the purpose of enhancing existing curriculum through cutting-edge technology, including virtual and augmented reality.
- ◆ Offered 138 new authentic learning experiences.
- ◆ Implemented *The Habits of Mind—16 problem-solving life skills for effectively operating in society*, as foundational stepping stones to the STU Grad Goals at the Lower School.
- ◆ Participated in the *Reimagining Assessment* conference, resulting in six teachers developing an assessment review as a step in collaboration with the Mastery Transcript Consortium.
- ◆ Renovated Staunton Campus auditorium with air conditioning and flexible furnishings, greatly expanding use of the space both for academic and social purposes and allowing the pilot of a 45-student interdisciplinary freshman course.
- ◆ Renovated Staunton campus library and arcade and updated several classrooms with collaborative furniture and workspaces.
- ◆ Reviewed STU Grad Goals—or core competencies—concluding that the addition of a health/wellness goal should be considered; a recommendation will follow in 2019-20.
- ◆ Continued partnership with Winchester Thurston School and participated for the 2nd year in their CoLearn Conference on place-based learning.
- ◆ Invited to present place-based authentic learning program at the NAIS annual conference.
- ◆ Worked to integrate chapel into the life of both campuses, with new Chaplain The Rev. Connor Gwin teaching and practicing mindfulness with students at all levels.



**Goal: We will move our Vision forward by enriching program and student experiences across all divisions and working to unite Lower, Middle and Upper Schools into one school community, while continuing to honor and build on each division's individual strengths. This will include: developing a robust transportation system that will help us realize our PreK-12 identity; enhancing the existing Lower School campus; and investing in the learning/living spaces on the Staunton campus and in our new downtown building to support our Vision.**

- ◆ Developed and the Board approved plans for The Eastham Center; construction will begin September 1, 2019, with the building scheduled to open in Fall 2020
- ◆ Renovated the LS common areas, gymnasium/cafeteria, and PreK cottage to serve as art studio
- ◆ Began offering free morning and afternoon shuttle bus runs between campuses
- ◆ Purchased two additional 14-passenger vehicles; stationed one at the LS to facilitate exchange between campuses
- ◆ Installed Zonar and Safe Student software to better track vehicle operation and communicate with bus riders' families
- ◆ Renovated all dormitory bathrooms in Old Main and Robertson
- ◆ Initiated BOG-approved installation of air conditioning in Staunton campus west wing, including the auditorium, music rooms and 14 dorm rooms
- ◆ Continued to grapple with HVAC issues on both campuses due to deferred maintenance and end-of-lifecycle systems, leading to a \$500,000 capital gift to fund a new boiler and repairs/upgrades going forward
- ◆ Held first PreK-12 Founders' Day ceremony, celebrating the School's 175<sup>th</sup> anniversary and Mark Eastham's 15 years of service
- ◆ Emphasized inter-grade and inter-division collaboration, including a project that allowed fourth graders to introduce composting to seventh graders and seventh graders to introduce the carbon cycle to fourth graders



**Goal: We will accomplish these goals within a comprehensive long-range financial plan, incorporating multiple sources of funds and a disciplined approach to expenses, emphasizing long-term sustainability and fiscal health.**

### Enrollment/Admissions

- ◆ Experienced strong enrollment:
  - ◇ Ended year with 310 students—14 more than 2017-18
  - ◇ 50/50 male/female split
  - ◇ 93 new students (new record)
  - ◇ 22 countries represented
- ◆ Reduced overall financial aid discount by 2 percent from 2017-18
- ◆ Increased Lower School prospective student visits by 18 percent
- ◆ Traveled to 11 countries to recruit (three new)
- ◆ Partnered with Fourdozen, a Vietnamese/American firm, to translate materials and website to facilitate recruitment
- ◆ Made decision to switch CRMs from HubSpot to Insightly, saving \$10,000/year
- ◆ BOG voted to work with American Curriculum Partnerships to explore the potential of increasing the School's revenue stream through international educational partnerships

Enrollment/NTR Year over Year	2017-18	2018-19
End-of-year enrollment	296	310
New students enrolled	83	93
Net Tuition Revenue	\$4,510,350	\$4,681,406

Comprehensive Campaign Results from July 1, 2012-June 30, 2019	
Total Capital Giving	\$8,146,920
Total Endowment Giving	\$3,386,679
Total Annual Fund Giving	\$2,848,765
Total Planned Giving	\$7,000,000
<b>Total Campaign through 6/30/19</b>	<b>\$21,382,364</b>

### Development

- ◆ Surpassed \$450,000 Annual Fund goal, increasing AF by more than \$50,000 over 2017-18
- ◆ Received 989 gifts from 457 donors vs. 798 gifts from 384 donors in 2017-18
- ◆ Day of Giving raised more than \$30,000, vs. \$2000-5000 in past years.
- ◆ Raised \$1.1 million in capital funds (cash and pledges) in 2018-19
- ◆ Broke fundraising record for annual gala, *Local Food for Thought*, with \$217,000 donated vs. \$125,000 budgeted
- ◆ Received \$50,000 gift to launch *Project Max—Maximizing Curriculum through Futuristic Technology*
- ◆ Celebrated 175<sup>th</sup> year by announcing these capital campaign naming opportunities at Alumni Weekend: Loevner Auditorium, Ronald and Susan Lambert Yates Dining Hall, SLY's Kitchen, Venable Arcade, Smith Room, Kramer Room, Hamm Board Room
- ◆ Development staff traveled for first time to China, receiving \$17,000 in Annual Fund gifts directly from visit

### Finances

- ◆ Recorded higher than budgeted revenue thanks to increased enrollment and annual gala fundraising results
- ◆ Recorded higher than budgeted expenses due to aging HVAC systems/infrastructure repairs and remodel of on-campus apartment necessitated by lead paint, mold and health concerns
- ◆ Used \$142,331 in plant reserves and other reserved funds to balance the 2018-19 budget
- ◆ Executed iterative process in Eastham Center design between development and architects to find a design to meet program aspirations and fundraising expectations
- ◆ Business operations constantly looking for ways to streamline processes and improve efficiency to enable more funding to go towards program

2018-19 Operating Results	
Actual vs. budgeted revenue	+\$78,052
Actual vs. budgeted expenses (includes unexpected capital expenses due to repairs to aged HVAC/infrastructure and dorm parent apartment lead/mold remediation)	+\$220,383
Surplus/(Deficit) before use of reserves	(\$142,331)
Plant and other reserves applied	\$142,331
Surplus/(Deficit) after use of reserves	\$0

## In other news...

### Class of 2018

- ⇒ 36 graduates
- ⇒ Admitted to 95 colleges and universities
- ⇒ Received more than \$1.5 million in merit aid



### In Athletics

- ◆ Fielded 20 athletic teams and clubs, serving 222 team members
- ◆ Became a member of VISAA (Virginia Independent School Athletic Association), in addition to VACA (Virginia Association of Christian Athletes)
- ◆ Initiated Lower School Lacrosse Club, with goal of expanding to MS/US in 2019-20
- ◆ Varsity girls' basketball team went undefeated in VACA regular season play, were runners-up in VACA State Tournament, and made it to quarterfinals of VISAA State Tournament
- ◆ Varsity girls' basketball player Jade Wimbish was named VACA State Player of the Year and VISSA All State

Record number of students participated in AP testing, with 71 sophomores, juniors, and seniors taking 147 AP tests



Named Best Independent School in the Shenandoah Valley for sixth year

## Looking ahead: From Michael Robinson, Head of School, 2019-

It is with great enthusiasm that I begin my tenure as Stuart Hall's 18th Head of School in its 176th year. I am especially fortunate to follow in the footsteps of Mark Eastham, a visionary and transformational leader who positioned Stuart Hall as an innovative force in the educational landscape while maintaining the School's core mission of preparing students "for engaged lives of intellectual curiosity, creativity, and contribution." It was a privilege to work with Mark during the transition and to experience his passion for Stuart Hall first-hand. I share that passion and promise to sustain the strong sense of inclusive community and purposeful mission he exemplified over the past fifteen years.

From the moment I set foot on campus last fall and over the past nine months of transition, it has been abundantly evident that this is a special community with a strong sense of inclusion, belonging, and commitment to academic excellence. My first goal as Head of School during these early weeks is to become a true member of the Stuart Hall community by engaging in a period of listening and learning. Thus far, I have met individually with fifty faculty and staff members to hear perspectives, concerns, and hopes.

It is a privilege to start my tenure as we begin innovative work at the Eastham Center. In the coming year, I will be working with the Stuart Hall faculty to further design the educational experiences that will come to life in the Center's beautiful, light-filled teaching and learning spaces. Our vision includes cutting edge technology as part of *Project Max*—including virtual and augmented reality—that will enhance existing curriculum. Additionally, E-Sports, audio and video editing studios, cooking, and community-gathering spaces will make the Eastham Center a hub of learning and fellowship for day and boarding students for years to come.

I am also deeply appreciative of the generous capital and annual fund support included in this report. It was a pleasure to travel with Mark Eastham and Chris Aycok last winter and spring to meet dedicated alumni and friends of the School in Atlanta, New York, and Richmond. Additionally, I had the opportunity to meet members of the Stuart Hall community during visits to Staunton for Founders' Day and Alumni Weekend. I'm excited to be making plans with Chris Aycok to "hit the road" to hear more from alumni and friends about their perspectives on the School and share my enthusiasm for the School's plans.

Another exciting initiative for this year involves working with American Curriculum Partnerships to explore the po-

tential for international school partnerships that are compatible with the School's mission and vision and are strategically and fiscally advantageous. Together with Ann Snyder, Director of External Affairs, school leaders and I will investigate partnerships that will enhance revenue, present cultural and educational exchange opportunities for students and faculty, and increase enrollment.

As I contribute this letter to the Annual Report, teachers and students are preparing to return to campus. I look forward to getting to know each family and each student—from PreK through the senior class—because it will be through hard work, dedication, and the relationships formed with every member of the Stuart Hall community that we honor the values, mission, and history of this great school. My wife, Frances, and the entire Robinson family are delighted to be joining the Stuart Hall community. I'm excited for the year ahead!

Sincerely,

Michael Robinson



<b>Stuart Hall CSDV Statistics</b>			
<b>Tuition</b>	<b>2017-18</b>	<b>2018-19</b>	<b>% Change</b>
Pre-K	\$8,100.00	8,100.00	0.00%
K-5	\$10,900.00	11,000.00	0.92%
6 to 8	\$13,000.00	13,300.00	2.31%
9th	\$15,400.00	15,700.00	1.95%
10 to 12	\$15,400.00	15,700.00	1.95%
5-day boarding	\$34,000.00	34,000.00	0.00%
7-day boarding	\$49,500.00	51,000.00	3.03%
INTL boarding	\$49,500.00	51,000.00	3.03%
ESL	\$4,500.00	5,000.00	11.11%
<b>Enrollment</b>	<b>FY18 Year-End</b>	<b>FY19 Year-End</b>	<b>% Change</b>
Boys	141	158	12.06%
Girls	155	152	-1.94%
Day Boys	108	109	0.93%
Day Girls	106	112	5.66%
Boarding Boys	33	49	48.48%
Boarding Girls	49	40	-18.37%
<b>Total</b>	<b>296</b>	<b>310</b>	<b>4.73%</b>
<b>Financial Aid</b>	<b>FY18</b>	<b>FY19</b>	<b>% Change</b>
Financial Aid as a % of Tuition	36.00%	34.00%	-5.56%
Fin Aid & Remission as a % of Tuition	37.00%	36.00%	-2.70%
% of Day Students on Financial aid	56.00%	44%	-21.43%
Average Day grant	\$4,987	\$4,151	-16.76%
% of Boarders on Financial Aid	62.00%	61.00%	-1.61%
Avg. Boarder Grant	\$32,291	\$30,708	-4.90%
<b>Development</b>	<b>FY18</b>	<b>FY19</b>	<b>% Change</b>
Non-Endowment Revenue	\$2,604,067	\$2,832,871	8.79%
Endowment--New Gifts	\$302,825	\$403,132	33.12%
<b>Total</b>	<b>\$2,906,892</b>	<b>\$3,236,004</b>	<b>11.32%</b>
Annual Fund	\$399,452	\$453,241	13.47%
% Alumni Giving	5.72%	9.01%	57.52%
Average Gift	\$1,264.73	\$991.24	-21.62%
% Parent Giving	23.15%	18.20%	-21.38%
Average Gift	\$1,210.06	\$1,102	-8.93%
% Fac/Staff Giving	30.76%	84.44%	174.51%
Average Gift	\$472.52	\$386.34	-18.24%
% Trustee Giving	91.85%	95.23%	3.68%
Average Gift	\$4,115.45	\$4,036.95	-1.91%
Endowment Net Assets			
Without Donor Restriction	\$199,692	\$220,899	10.62%
With Donor Restriction	\$5,622,694	\$5,895,051	4.84%
<b>Total Endowment Assets</b>	<b>\$5,822,386</b>	<b>\$6,115,950</b>	<b>5.04%</b>
Capital Campaign--Cash			
Beginning of the year	1,331,374	2,312,875	73.72%
Contributions	1,290,548	1,389,770	7.69%
Interest Income	15,008	13,669	-8.92%
Disbursements	(324,055)	(2,872,322)	786.37%
End of the year	\$2,312,875	\$ 843,991	-63.51%
<b>Personnel (Full-time Equivalents)</b>	<b>FY18</b>	<b>FY19</b>	<b>% Change</b>
Instructional	33.1	33	-0.30%
Instructional Support	7.15	6.5	-9.09%
Administration	7	7.75	10.71%
Facilities & Transportation	9.8	9.5	-3.06%
All Other	18.9	18.6	-1.59%
<b>Total</b>	<b>75.95</b>	<b>75.35</b>	<b>-0.79%</b>
<i>These statistics do not put a weight on OCF's</i>			