

Portledge School Strategic Plan



**FORGING PATHWAYS
TO EXCELLENCE**



Our Mission

Portledge School offers a competitive college preparatory program in a warm, inclusive community. Students are inspired to realize their individual potential by developing the critical thinking skills and moral courage necessary for lifelong learning in an increasingly complex world.

Portledge School defines Moral Courage as: Acting with Kindness, Honor, Purpose, and Respect while recognizing such actions may not be easy.

At Portledge School, education has always been more than a set of courses or a linear roadmap. It is a living, breathing experience. One that shapes character, sparks possibility, and empowers young people to understand who they are and how they will contribute to a rapidly changing world.

Every day, we see this firsthand.

In classrooms filled with inquiry.

On stages where imagination takes flight.

In labs where ideas are tested and refined.

And on fields where resilience, teamwork, and pride are built.

What makes Portledge special is not just what happens in these spaces...but *how* it happens. We are a community connected by purpose. We know every student deeply. We celebrate curiosity, creativity, and individual growth. And we ground everything we do in the values that define us: kindness, honor, purpose, and respect.

As we look to the future, we do so with confidence
—and with a clear, purposeful direction.





This Strategic Plan, Forging Pathways to Excellence, builds on our strengths while evolving how we deliver excellence. It is a bold and thoughtful roadmap for the next five years that positions Portledge for long-term strength, relevance, and distinction.

This plan is not about unveiling a single big moment. It is about something far more transformative: ensuring that Portledge continues to thrive, adapt, and lead with vision in a world that is shifting around us. **Forging Pathways to Excellence** focuses on five key priorities:

- **Dynamic Learning.** Elevating teaching, innovation, and the evolving role of AI.
- **Holistic Development** with plans to expand student life, the arts, and real-world learning.
- **Athletic Pride.** Strengthening programs, coaching, and the student-athlete experience.
- **Inspired Governance**, where we will evaluate our long-term planning and streamline our communications and operations.
- **And Enduring Strength.** At the foundation of the plan is ensuring financial sustainability and thoughtful campus growth for years to come.

Collectively, these priorities equip us to inspire young minds, explore new possibilities, sustain what matters most, and evolve with purpose and excellence.

Most importantly, they reflect who we are and who we aspire to be.

This plan is not just a document. It is a shared commitment to our students, faculty, staff, families, and the future of Portledge. Over the next five years, you'll see this work come to life. In classrooms, on fields, across our campus, and in the stories of the young people we are privileged to guide.

Thank you for being part of this community, and for shaping this next chapter with us. Join us as we forge the future of Portledge...together.



Simon Owen-Williams



The Planning Process & Overview

With the support of the Board of Trustees, a Strategic Planning Committee of trustees, faculty, and staff was formed in Spring 2025. The committee gathered input from parents, faculty, staff, and alumni to inform the process. That same year, Portledge School received renewed NYS AIS accreditation, and the resulting recommendations also helped shape the goals and five-year scope of this plan, aligning strategic planning with the NYS AIS accreditation cycle.

Forging Pathways to Excellence was presented to the Board for review and input and was formally approved by the Board of Trustees in September 2025.

Strategic Planning Committee

Dr. Kevin Mercier, Trustee & Chair

Ari Sass, Trustee & Chair

Simon Owen-Williams, Head of School

Ryann Supple, Chair

Tara Askeland

Colleen Burke

Melissa Damm

Traci Douglas

Francisco Lameiro

Saralyn Lawn

Amy Manzone

Michael Powers

Trish Rigg

Jeffrey Suzda

Erica Tettermer



Vision Statement

The **Forging Pathways to Excellence** Strategic Plan sets forth a purposeful direction—building on our strengths and evolving how we deliver excellence. We are driven by our deep commitment to inspire young minds, explore possibilities, sustain what matters, and lead with vision.

Forging Pathways to Excellence is not just about what we do—it's about how we can do it better. Through the lens of innovation, the evolving possibilities of Artificial Intelligence (AI), and the lived experiences of our students, families, faculty, and staff, this plan ensures that our mission not only endures but evolves with purpose and excellence.

Goal 1: Forging Pathways to Dynamic Learning

- **Invest in Faculty & Staff**

- Build robust professional development, mentorship, and training in emerging technologies and ethical Artificial Intelligence (AI).
- Attract, support, and retain exceptional educators who inspire excellence.

- **Align Curriculum Across Divisions**

- Strengthen continuity from Early Childhood through Upper School, with emphasis on bridging the International Baccalaureate framework from the Primary Years Programme (PYP) to the Diploma Programme (DP).
- Use data and benchmarks to refine learning while supporting individualized instruction.
- Physical Education in Grades 5–8 will transition to a division-based academic program, reporting to the corresponding Division Directors, and will be guided by a clearly defined PE curriculum with age-appropriate learning outcomes.

- **Foster Cross-Divisional Learning**

- Create structured opportunities for collaborative, student-centered projects that use campus and community as a living classroom.





Potential AI Integrations

- Develop AI literacy modules focusing on classroom applications, data privacy, bias mitigation, and AI-supported instructional strategies.
- Leverage AI tools to audit existing curriculum mapping platforms, identify gaps or inconsistencies, and highlight best practices for effective implementation and usage across divisions.
- Use a curriculum mapper to create a vertically integrated Pre-Nursery to 12 PE progression, including skills, fitness benchmarks, and seasonal plans, ensuring alignment across all divisions.
- Leverage AI to generate insights from assessment data, helping faculty refine benchmarks and identify areas for enrichment or remediation.

Goal 2: Forging Pathways to Holistic Development

- **Strengthen Student Life & Culture**
 - Position co-curricular activities and experiences beyond the classroom as central to identity, belonging, wellness, athletics, and school spirit.
- **Increase Visibility & Quality**
 - Elevate the arts, partnerships, and student life by sharing stories through the voices of students and the impact of alumni.
 - Across digital and print platforms, interdisciplinary programs, and community partnerships, we will spotlight the creativity, collaboration, and risk-taking that drive student growth and define our arts programming.
- **Expand Community Engagement**
 - Deepen partnerships with local organizations and cultural institutions to enrich real-world learning.





Potential AI Integrations

- Model scheduling scenarios that maximize student access and minimize conflicts.
- Apply AI analytics to track program engagement, helping to inform a vertically integrated, mission-aligned co-curricular vision.
- Use AI-optimized calendars to significantly reduce scheduling conflicts.



Goal 3: Forging Pathways to Athletic Pride

- **Define a Unified Athletic Vision**
 - Establish a vertically integrated philosophy that reflects the school's mission and promotes integrity, excellence, and healthy competition.
- **Inspire Pride and Panther Spirit**
 - Instill values of teamwork, sportsmanship, and school pride that strengthen community identity and celebrate our student-athletes.
- **Attract, Develop & Retain Outstanding Athletic Staff**
 - Recruit and support athletics staff who bring expertise, leadership, and strong community connections, ensuring a consistent vision across programs.
- **Elevate Programs & Facilities**
 - Maximize existing fields and resources with phased improvements, support continuity in athletics for Grades 5–12.
 - Explore options for Grades 5-8 athletics that emphasize skill-building, wellness, and balanced participation.

Potential AI Integrations

- Personalized micro-learning software for coaches to streamline practice planning, sports psychology basics, and fitness/wellness modules.
- Track team-level—not individual-level—progress: attendance, skill improvements, seasonal objectives, avoiding student-data privacy pitfalls.
- Utilize predictive scheduling to optimize field and gym usage and streamline practice and rainy-day rotations.



Goal 4: Forging Pathways to Inspired Governance

- **Align Workflows & Clarify Leadership Roles**
 - Renew and refine administrative responsibilities and coordinate efforts to strengthen internal communication and planning.
- **Develop Succession Planning**
 - Establish and maintain robust succession strategies for key leadership positions and the board of trustees.
- **Foster a Culture of Reflective Governance**
 - Evaluate and implement board best practices to ensure strategic focus, generative thinking, and institutional continuity.

Potential AI Integrations

- Map and analyze existing organizational structures, reporting lines, and workflow efficiencies to identify areas for improvement.
- Standardize and automate routine administrative processes.
- Use AI forecasting tools to model leadership needs over time, aligning succession planning with demographic trends, retirements, and institutional goals.



Goal 5: Forging Pathways to Enduring Strength

- **Ensure Long-Term Academic & Financial Sustainability**
 - Advance the strategic growth of Portledge by planning for the expansion of the school's endowment and enhancing financial forecasting models that proactively support academic excellence and institutional priorities well into the future.
- **Advance Enrollment Strategy**
 - Develop a long-term, data-driven enrollment plan that attracts a diverse and engaged student body aligned with the school's mission, while regularly assessing tuition, financial assistance, and merit-based aid policies to ensure accessibility and to effectively communicate the enduring value of a Portledge education.
- **Prioritize Campus Modernization**
 - Enhance campus facilities with an updated master plan to support programmatic excellence and drive enrollment.

Potential AI Integrations

- Develop dynamic financial models that incorporate variables such as enrollment trends, economic indicators, regional demographics, and market volatility, offering predictive insights for budgeting and contingency planning.
- Analyze historical admissions data, inquiry patterns, and retention trends to forecast enrollment pipelines and identify characteristics of students most aligned with the mission.
- Apply AI-powered systems (such as IoT + predictive analytics) to monitor building systems, identify maintenance needs proactively, optimize resource allocation for deferred maintenance and modernization efforts, and create phased facility improvement visuals to support long-term planning.
- Utilize AI to model the impact of facility upgrades on recruitment, retention, and program delivery over time.



THE CHEN CENTER



FORGING PATHWAYS TO EXCELLENCE

