



IVYWOOD CLASSICAL ACADEMY

Board Retreat

Date: Tuesday, October 27, 2026

Time: 9:00 am - 3:30 pm

Location: NorthRidge Church
(Rm. 2214)

SS-1	Participants were welcomed and experienced the value of relationships and meaningful connections.
SS-2	Participants clearly understood the current state and future vision of the Academy
SS-3	The most essential items related to the health and growth of the Academy were discussed in an open, action-oriented, and effective manner.
SS-4	A 10-year goal and a 5-year vision were reviewed, and annual priorities were identified.
SS-5	The activities led to collaboration, unification, mutual challenge of the status quo, and relationship-building.
SS-6	Participants left feeling inspired, developed, connected, and supported.

Pre-work for Board Orientation & Recruitment: Board members assess their current standing against the Hillsdale Classical Roadmap governance expectations and identify potential action items.

Agenda Item	Time	Who	Strategic Plan Alignment	Desired Outcomes	How to Prepare
Welcome & Overview	9:00–9:20 AM (20 min)	Caryn Slater, Tyler Horning		• Review goals and expectations for the day.	



IVYWOOD

CLASSICAL ACADEMY

Board Retreat

Choice Schools MUpdate	9:20–9:30 AM (10 min)	Caryn Slater		• Share key Choice Schools updates and their impact on Ivywood.	
Strategic Plan Review & Arc of the Year	9:30–10:30 AM (60 min)	Caryn Slater, Kayla Cruthers	2027 Strategic Plan, Hillsdale Classical Roadmap	• Review progress toward the 2027 Strategic Plan. • Review Hillsdale Roadmap progress and next steps. • Review academic data and KPIs. • Identify priorities and areas needing attention.	Caryn, Kayla, Tom, Grace: Hillsdale Roadmap-update on the current state Caryn will collect metrics and current state on KPI data Caryn, Kayla and team: Strategic Plan- Current plans current state (RYG) Kayla: share Arc of the year priorities  ICA 26-27 Master Y... Choice AET: prepare Academic Data



IVYWOOD CLASSICAL ACADEMY

Board Retreat

Professional Development & Faculty Growth	10:30–11:00 AM (30 min)	Kayla, Grace, Tom, Ali	2.1.1: Individual teacher professional development plans. 2.2.1: Structured teacher mentorship program.	• Review teacher development plans and progress. • Review mentorship program implementation. • Identify additional support needed for classical instruction.	Kayla, Tom, Grace, Ali: current coaching and mentorship process and how it's going - Professional development plan overview (upcoming events or trainings, focus areas, Arc of the Year), Prescribed webinars (Tom/Grace), Tiers, When does HR get involved
Financial Status	11:00–11:30 AM (30 min)	Geoff, Katy	Financial sustainability Goal 2.3: Faculty development endowment.	• Review current financial performance and projections. • Discuss financial risks and opportunities. • Identify funding priorities and upcoming decisions. • Holiday bonuses.	Geoff: Update 5-year outlook including impact of Bond payments next year. Identify risks and provide solutions or options. Geoff: Provide estimated cost projections for holiday bonus scenarios Director of Development: Discuss progress on fundraising. Discuss opportunities regarding faculty



IVYWOOD

CLASSICAL ACADEMY

Board Retreat

					developing an endowment? Discuss if this is still a focus area for the board – next steps
Staffing & Compensation	11:30 AM–12:15 PM (45 min)	Matt	2.3.2: Funding for classical education and advanced studies.	• Discuss long-term compensation goals and financial scenarios. • Review employee engagement results with Kayla. • Discuss funding opportunities for faculty development.	Matt: The goal is __% above market - Explain the scenarios that we need to remove or add to achieve this long-term. Matt and Kayla: Review results and trends; document key focus areas or next steps.
Lunch/Board Meeting	12:15–1:15 PM (30 min)	All			



IVYWOOD

CLASSICAL ACADEMY

Board Retreat

Site Development & Five-Year Operations	12:45–1:45 PM (60 min)	King Scott, Kayla, Tyler, Ben, Caryn	3.1.2: Facilities that support teacher learning and growth.	• Review site plans, costs, and timelines. • Determine whether plans meet long-term needs (classroom and gymnasium needs). • Review five-year operations priorities and project progress. • Identify risks and next steps.	Space Constraints & ideas for resolution Share progress on site development and timeline. Connect to student and staff experience. Identify risks. Caryn: Collect from Tiffany 5 year ops-Snapshot including # of major projects, # of minor projects, % in progress % completed,
Board Orientation & Recruitment	1:45–2:30 PM (45 min)	Governance Committee, Jeff	Hillsdale Classical Roadmap: Governance	• Review proposed board orientation process. • Discuss committee structure and recruitment needs. • Identify next steps based on Hillsdale governance expectations.	Jeff: Board orientation draft Jeff: Prepare Committees Structures Update Jeff: Monthly Questions Pre-Work: Have Board members rank their current standing on the Hillsdale Roadmap for Governance– identify their action items based on that



IVYWOOD

CLASSICAL ACADEMY

Board Retreat

Marketing Plan	2:30–3:15 PM (45 min)	Kerri	10-Year Target: Become a sought-after classical education provider.	• Review marketing strategies, enrollment data, and results. • Discuss what's working and areas for improvement. • Identify marketing and enrollment priorities. • Discuss developing an annual report.	Kerri: Present Marketing Plan - Enrollment Projections FOR SPRING RETREAT: Annual report *what went well? What do we change?
Wrap-Up	3:15–3:30 PM (15 min)	Caryn Slater		• Review key decisions and priorities. • Confirm next steps, owners, and timelines.	