

A LOOK AT TWO PROGRAMS IN THE FIELD

ACCESS, AFFORDABILITY, INCLUSION, AND SUCCESS

**ONE INDEPENDENT SCHOOL'S PATH TOWARD REFLECTING
TODAY'S AND TOMORROW'S AMERICA**

By Al Adams

It is a given that most independent schools serve a large majority of wealthy families, a small number of poor families, and few in between, and that the economic distribution of independent school communities is often described as “bimodal” or shaped like a barbell. This description is accurate because of the limited amount of financial aid generally available and each school’s desire to use that assistance in ways that have the maximum impact on students’ lives. Hence, the bulk of financial aid budgets are devoted to the neediest families.

From 1895 to 1972, Lick-Wilmerding High School in San Francisco, California, charged no tuition. From 1972 to 1988 Lick-Wilmerding charged less-than-market-rate tuition for all families, regardless of financial need, along with providing some financial aid to those who qualified. Today, 23 percent of L-W’s operating budget is devoted to Flexible Tuition; 42 percent of its families benefit from the school’s Flexible Tuition Program, paying an average of \$9,000, with a range of \$1,000 to \$28,000 for that cohort.

Thanks to this 113-year history of being accessible to students from all walks of life, L-W enjoys the legacy, the resources, and the strategic resolve to push the limits on what it can mean to be a truly accessible independent school. Forty percent of its students matriculate from public and parochial schools; 50 percent of its students identify as being students of color; and its student population of 425 hails from more than 60 Bay Area middle schools.

One thing we have learned during my two decades as Lick's head is that the language of discourse really matters — especially when you are talking about accessibility. Because of feedback I received from parents during my first year at Lick (1988–1989), for the past 18 years, we have eschewed the use of the term “financial aid” in favor of “flexible tuition.” The reason is straightforward. We have been told repeatedly that it feels much more welcoming for a prospective family to hear “Tuition next year will range between \$1,000 and \$28,980, depending on your family's ability to pay,” than to hear “Tuition next year is going to be \$28,980, BUT we have a good deal of financial aid.” This alternative language was prompted by a father at a town meeting I hosted those many years ago. He said, “Al, I don't care how much financial aid you have; I am never going to ask for it. To me ‘financial aid’ sounds like a handout and would make me feel like a second-class citizen.”

Another thing we have learned is that providing access to less-than-affluent families is not, in the end, about the school “doing good.” It is, instead, about enriching the learning and living environment for all our students. Every student and his or her family bring a special set of gifts to contribute to the mosaic of the school community. Diversity, whether economic, racial/ethnic, educational preparation, or neighborhood, is a vehicle for introducing students to experiences, understandings, ways of thinking, and ways of being that are different from their own.

At the beginning of my first year of teaching in an independent school (1969–1970), an older friend who was familiar with the independent school world chided me, “Are you sure you want to devote your career to helping rich kids learn how to stay ahead?” Another fortuitous “learning” for me these past two decades is that the greater the diversity of a school's student body, beginning with economic diversity, the broader the band of teacher backgrounds that will be attracted to the school. Teachers are, on the whole, an idealistic lot and are ideologically most comfortable serving students from across the economic spectrum. In addition, those teachers who are of color and those who come from modest means or from public school backgrounds are also more likely to find peace in the independent school world if they encounter students and families like themselves on a daily basis.

L-W's recent 20-year journey through the diversity labyrinth can be traced by following the evolution of its board's standing committee devoted to this realm. Looking back, I see that the name of this committee has morphed about every seven years to reflect the changing foci of its work. For the first chapter, roughly 1988–1995, we referred to it as the *Access and Affordability Committee*. Our primary concern during these years was to develop a flexible tuition distribution formula and to provide sufficient funding to ensure that we would be able to sustain the school's historic level of economic diversity. Most important was to make certain that our families would robustly represent the full continuum of economic circumstances, paying special attention to ensuring that the middle class would

continue to be fully present. Our underlying premise, which has been borne out over the years, was that it is middle-class students and families who provide a literal and metaphorical bridge between the most and the least affluent members of our community.

ACCESS AND AFFORDABILITY

Our first major challenge was to create and then adhere to a formula that would increase the flexible tuition budget at a faster rate than annual tuition increases. We called this our “1.5X” formula, whereby the annual flexible tuition budget would increase 1.5 times the difference between inflation and the percentage of tuition increase, plus the rate of inflation (3 percent) (i.e., if inflation for a given year is 3 percent and tuition is increasing by 5 percent, the flexible tuition budget must increase by 6 percent ($1.5 \times (5\% - 3\%) + \text{inflation } (3\%) = 6\%$). Rick England, L-W’s CFO, who has masterfully shaped and guided our Flexible Tuition Program for the past 15 years, notes: “We have found that in recent years, as the ratio between what flex families and full-tuition families pay has changed (from a 2:1 ratio to closer to 10:7), the 1.5X formula isn’t as accurate.” Another way to explain this would be to say: “As the average level of support for flex families has moved from 66 percent (2:1) closer to 70 percent (10:7), the 1.5X formula isn’t as accurate.” Therefore, in recent years, we have adopted the following approach, which is very close in results: Multiply the current average level of contribution by flex families by the rate of inflation; then subtract this inflation-adjusted figure from the new tuition to determine the average level of support. Our basic assumption here is that flex family income increases at the rate of inflation; therefore, if tuition is increasing at a higher rate, the funding portion per family is actually increasing at a higher percentage. Or more simply stated: “To determine the average funding level for the upcoming budget year, we increase the current average flex family contribution by the inflation rate and then subtract this figure from the new tuition to determine the average level of funding.”

This formulation was driven by our understanding that, should tuition and the flexible tuition budget rise at the same rate, there would be insufficient funds to support families on the margin who fell into the need category because of the increased tuition. Were we to lose these families, middle-class representation would shrink, and our school would become less economically diverse.

Because we knew little about the income distribution of our families who do not apply for flexible tuition, for several years we asked all of our families to submit an anonymous “financial circumstances questionnaire.” Our purpose was to track the number of middle-class families in our community. We usually experienced about a 45 percent return rate and presumed that our most affluent families were least likely to complete the survey. The lack of precision of this instrument notwithstanding, we did in the early 1990s note a worrisome trend suggesting that a middle-class dip was beginning to develop. As a result, we altered

A LOOK AT TWO PROGRAMS IN THE FIELD

our flexible tuition distribution formula, which appears to have corrected the problem. “Affording Lick-Wilmerding,” found in the admissions section of the L-W website, provides information about the Flexible Tuition Program and refers to the related brochure provided in the admission packet. The graphs in Figures 1 and 2 also demonstrate that we have, over the years, been able to keep families “in play” across the economic continuum.

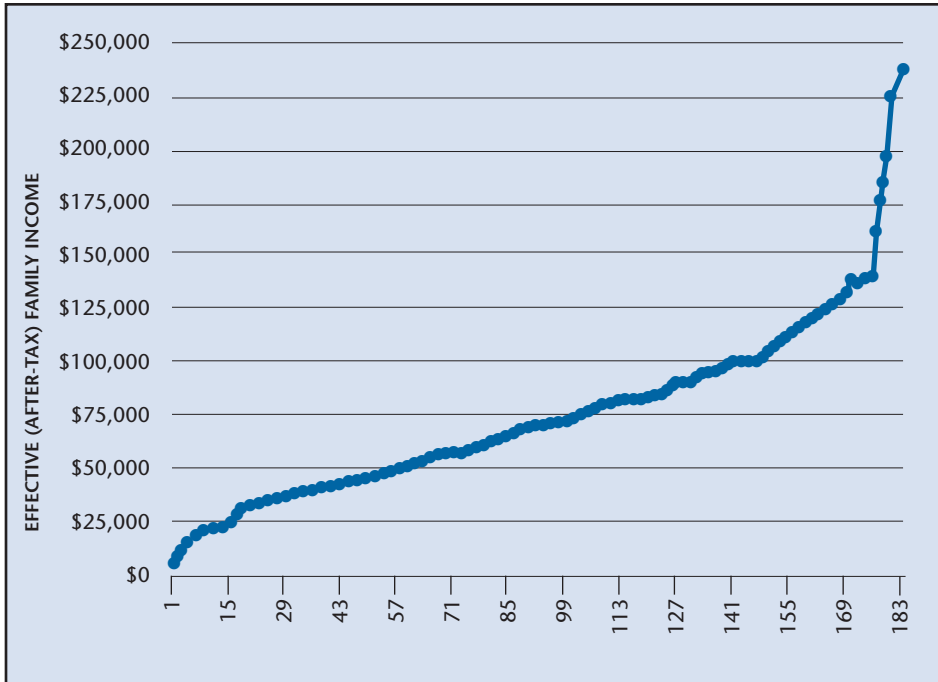


FIGURE 1: FLEX FAMILIES’ EFFECTIVE INCOME, 2007–2008

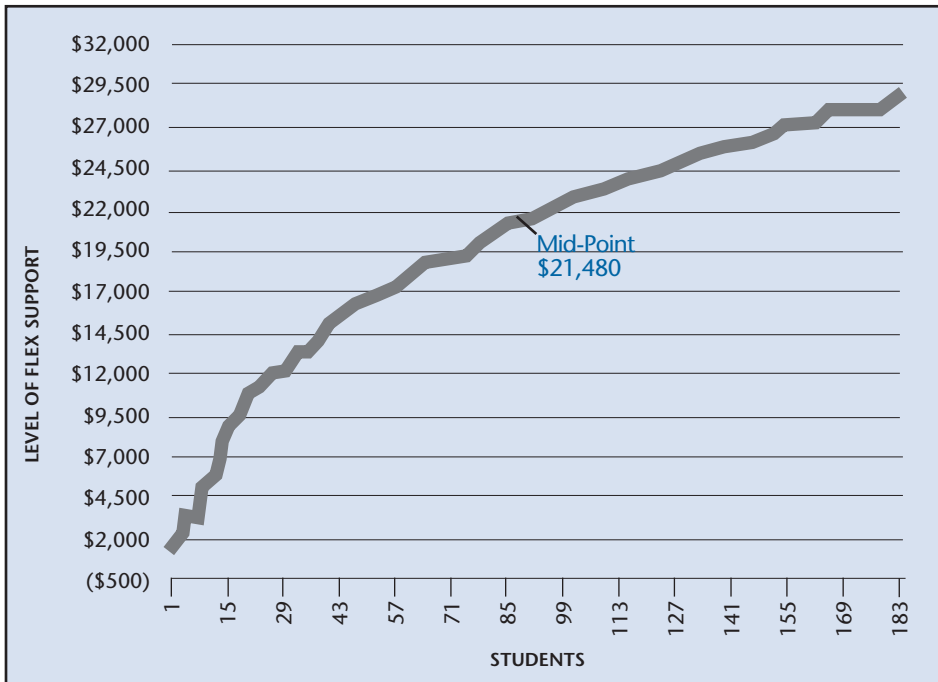


FIGURE 2: LEVEL OF FLEX SUPPORT, 2007–2008

ACCESS AND INCLUSIVE COMMUNITY

While our eye was primarily on the prize of access and affordability during those early years, we found ourselves also increasingly drawn to the other side of the access equation: inclusion. It is one thing to open a school's doors to larger numbers of traditionally atypical independent school students; it is quite another to develop a culture that allows these students and their families to feel fully welcome and for these students to be able to bring their whole selves to school each day. During our *VISION 2002* strategic planning process, which began in 1995, we decided to change the *Access and Affordability Committee* to the *Access and Inclusive Community Committee*. This name change was intended to reflect the deep and systematic work we had begun to do to approach the day when every student and family would feel "equally cared for, equally cared about, and equally celebrated." While these words roll trippingly off the tongue, the reality is much more difficult to realize.

There were many dimensions to the inclusive community challenge, beginning with the relational, the interpersonal, and the intrapersonal (see our then Dean of Multicultural Affairs Ilana Kaufman's article in the Summer 2003 *Independent School* magazine, "Directing Diversity: Advice for Schools and Diversity Directors"). But there were structural innovations that were also essential, such as incorporating virtually all student expenses (textbooks, yearbook, etc.) into tuition (leading to the end of extra fees) so that these financial burdens would be mitigated by Flexible Tuition. We also committed to providing Flexible Tuition dollars to help with the few remaining extras, such as foreign language trips and the prom. Similarly, we redesigned our annual fund raiser so that its cost would no longer exclude a major portion of our community. In doing so, we needed to accept the fact that community building was a higher priority than raising money. As a result, the former dinner/live auction format transitioned to our annual "Culture Jam," which features food, festivity, a silent auction with something for everyone, and parent/faculty/staff performances.

ACCESS AND SUCCESS

Somewhere along the way, probably around the turn of the millennium, we decided once again to change the name of our diversity-related board committee, this time from *Access and Inclusive Community* to *Access and Success*. While less lyrical to the ear, "Access and Success" was intended to convey our increasing understanding of the academic challenges faced by less-than-privileged students and those who were previously unfamiliar with what an independent school is and how it operates. These students are every bit as bright as their independent school-trained peers; they arrive at Lick boasting straight-A's from their public or parochial middle schools. Nevertheless, they have generally not benefited from the same level of preparation as students who have previously been immersed in independent schools. Over the years, we have become increasingly intentional

about designing ways to level the playing field for these students and developing ways to approach the teaching of all of our students as the unique and complex individuals they truly are.

Viewing our school through the access and success lens led us to create our *Learning Strategies Center*, directed by a learning specialist. In addition to performing preliminary screening for learning differences and working closely with students with special learning challenges (and their teachers), he also plays a leading role in making an appreciation of metacognition pervasive at our school. To the extent that we succeed in helping all of our students “learn how they learn,” we empower them for a lifetime and also deepen their appreciation for the different ways other people learn and take in the world. Simultaneously, we developed our “Triple S” (Student Support Services) Team, which comprises our dean of students, class deans, learning specialist, counselor, and director of multicultural programs. This team meets regularly to discuss and develop intervention or support plans for students who appear to be struggling, whether academically, socially, emotionally, or culturally.

The expansion and central purpose of student affinity clubs have also been important in providing sanctuaries and support systems for students from widely varying backgrounds. This, of course, suggests the most effective solution of all — to have a large enough critical mass of each “variety” of student and staff member so that students, their families, and their teachers see others like themselves within the school community.

If economic diversity is the hardest of the “diversities” to acknowledge and discuss, the issue of students being “differently prepared” runs a very close second in the independent school world. Given that we have 700 eighth graders applying for 100 ninth-grade seats each year, we could easily fill our school with only the “best and brightest” from the most culturally privileged backgrounds and with the most excellent of K–8 preparations. We choose, however, to build our entering classes in a different way. One of our emeritus trustees, a former board chair, often remarks that independent school faculties have the opportunity “to serve the easiest students in the world and to teach in nearly ideal teaching conditions.” Similarly, a former Lick history department chair, who now teaches in a public high school in Racine, Wisconsin, recently wrote to me that her new colleagues, having heard of her experiences at our school, often refer to Lick as “Oz.” It is clearly difficult for them to imagine teaching in such a nirvana as we experience in independent schools.

The reality is that an independent school can only aspire to and succeed at serving a differently diverse student body if its faculty is willing to work harder and work differently, in more creative and flexible ways. The first part of this collegial challenge is for each teacher to be enthused about understanding the very real differences that characterize students coming from dissimilar backgrounds. As we have found, the result is an imperative to begin to think differently about teaching

and learning. The diversity of student needs compels teachers to develop personalized and multimodal approaches to teaching that may have appeared unnecessary in a more homogeneous school. What soon becomes apparent, however, is that such an angle of vision on teaching ultimately serves all students better, including the most privileged and most exquisitely prepared. We have found that most teachers are “up for” this challenge because their deep-seated goal is not simply to “help rich kids learn to stay ahead” or to take credit for successfully funneling the best, brightest, and most privileged to their preordained societal positions. Instead, most teachers yearn to assist in the growth and development of *all* their students—to accept them for who they are, where they are, and where they come from, and to shepherd them toward their most lofty aspirations.

The question of financial aid in independent schools relates to much more than whether schools allocate 8 percent, 10 percent, or 12 percent of their operating budgets for this purpose. As I learned early on as a new head, a school’s budget is a direct reflection of its values. It is also only a starting point, as the daily experiences of students and their families are the sum total of school culture, degree of personalized and differentiated instruction, and both the kind and the quality of adult–student relationships. While few schools currently have the capacity to devote 23 percent of their annual budgets to Flexible Tuition, there are many things they can do to make their campuses and their cultures welcoming to less-than-privileged students and families. As their nontraditional student and teacher numbers increase, they will also find that their reputation as a truly inclusive community will climb. They will further discover that their fund-raising prospects grow as their school becomes recognized throughout their community as a place that serves young people from all walks of life.

Schools like ours make this commitment to inclusion because we believe we have a moral imperative to do so and because it enriches our learning communities. But there is also an enlightened self-interest dimension that resembles putting positive karma into the universe. As a school becomes known as a truly meritocratic place that embraces students and families from across the economic continuum, it is soon seen as a good and faithful neighbor. Rather than being viewed as a bastion of privilege, the school is seen to enhance the life of its community at every level. To my mind, there is no more powerful way to touch and shape a school’s soul than to open its doors wide and, as a consequence, become the embodiment of the very future we imagine and hope for.

Al Adams has served as Head of School for Lick-Wilmerding High School in San Francisco, California, since 1988.

ST. GEORGE'S INDEPENDENT SCHOOL

By William W. Taylor

Ten years ago, St. George's Independent School in Germantown, Tennessee, developed plans to expand its PK–6 program to include a middle and upper school. Included in this planning was a renewed commitment to explore ways in which the school could grow more economically and racially diverse. Although committed to diversity from its founding in 1959, St. George's had traditionally served the primarily affluent Caucasian families that constituted the suburban demographic surrounding the school. Amid many efforts toward racial reconciliation, the wider Memphis community has been historically challenged by barriers that separated communities racially and economically. With the decision to expand the school, St. George's leadership began to explore creative opportunities that would enhance the school's commitment to diversity.

As the school continued with its plan to build a middle and upper school campus in suburban Memphis, an anonymous donor challenged the school's leadership to consider opening a third campus as a means to broaden school diversity. This would be an elementary school located in the city of Memphis and designed to mirror the suburban elementary school in terms of school philosophy, curriculum, and admissions criteria. Tuition at the urban school, however, would be funded primarily by scholarships. St. George's accepted this challenge, and anonymous donors kicked off the scholarship fund-raising efforts with a \$6 million challenge grant. This lead gift generated momentum and enthusiasm as the new vision was implemented and a more broadly based fund-raising initiative commenced. Inherent in this vision would be the opportunities for collaboration and mutuality between students at the suburban and the urban elementary school. Furthermore, students from both elementary schools would have the opportunity to transition to the middle and upper school campus, where they would continue their preparation for college through the completion of the school's challenging curriculum.

St. George's vision was positively received by many in the wider Memphis community who saw this as an opportunity for education to be the means to breach racial and economic boundaries. Moreover, there was broad philanthropic interest in this vision because it included access to a pathway to college for a segment of the population who would otherwise find such access to be more challenging. The long-term vision is for the school's graduates to return to Memphis after college, where they will continue to be dynamic forces in breaking down the racial and economic barriers that exist in this community.

In 2001, St. George's opened its campus in Memphis with 20 students in pre-kindergarten. Since its opening, this campus has added one grade a year and now

has approximately 140 students from pre-kindergarten through fourth grade. Scholarships fund approximately 90 percent of the tuition at the urban campus, and 95 percent of the student body comprises predominately lower-income students of color. Annual costs associated with the scholarship commitment exceed \$1 million.

In 2002, St. George's opened its middle and upper school campus in the Memphis suburb of Collierville. Beginning with an enrollment of approximately 145 students in grades six through nine, this campus has grown to an enrollment of 640 in grades six through 12. In 2009, rising sixth graders from the urban elementary campus will join their classmates from the suburban elementary campus at the school's middle and upper school campus.

Since St. George's began its expansion in 2001, its demography has changed considerably. In the 2000–2001 school year, the enrollment of 384 students included only 1 percent students of color. In the 2007–2008 school year, enrollment exceeded 1,200 students, including 15 percent students of color. The percentage of students of color in the school's enrollment is projected to grow to 25 percent by 2016, the year the first students from the urban elementary campus will graduate from high school and move on to college.

The impact of the expansion of St. George's cannot be measured in statistics. Rather, it is to be found in the interaction and the enrichment that come from the relationships forged among students and families. The two elementary campuses share not only the same school philosophy but the same curriculum. Both campuses follow the same guidelines for school admission. Throughout the school year, the students from each campus gather for mutual experiences, such as collaborative learning exercises and field trips. Older students from the middle and upper school campus serve as big brothers and big sisters to the elementary students at both campuses and are tutors, mentors, and friends.

With a strong college preparatory curriculum, small class sizes, and a caring faculty, St. George's has helped close the educational gap between economically disadvantaged urban students and more affluent suburban students. The St. George's initiative is breaking down barriers. The critical linchpin is found in the relationships among students and in forging these relationships when the students are young and are not as aware of the racial and socioeconomic lines of division in the larger community as they will be later in life.

The St. George's initiative has worked to bring together families from different socioeconomic backgrounds. Throughout the school year, families gather for social functions designed to foster relationships among the parents. Although there are three campuses, increasingly students and parents perceive St. George's as one school. For example, St. George's created an "elementary night" for football and basketball games in which the younger students and their families were recognized with special half-time celebrations. Similar additional events serve to bring families together. Despite socioeconomic differences, all share the same school.

St. George's recently hired a director of community relations. The responsibilities of this position include finding ways to enhance the opportunities for all our students and families to learn and grow from relationships with people of different socioeconomic backgrounds. The director has had experience working with urban youth and is equally comfortable in a suburban setting, characteristics deemed essential for this position. Additionally, a "Connections Committee" on each of the three campuses is charged with planning events designed to bring the school community together. An Executive Connections Committee, consisting of members from each of the three committees, meets regularly to coordinate event planning and to brainstorm ways in which the relationships in the school community can continue to grow.

In addition to the fund-raising challenge of providing scholarships for students from PK through 12th grade, the school has encountered other challenges associated with this initiative, some predictive, some not. Some families chose to leave the school because they could not support the school's vision. Fortunately, more families chose to join the school community *because* of its vision. Other challenges provided the school with opportunities to grow:

Transportation: The two elementary campuses are approximately 16 miles apart, and the urban campus is about 20 miles from the middle and upper school campus. The school does not own any buses and relies largely on parent volunteers to take elementary students from both campuses on field trips. More important, some families with limited access to transportation at the urban elementary campus will encounter significant difficulties with transportation when their child moves to the middle and upper school campus. The school is planning to purchase buses that will address these issues.

School functions: Some school events had to be reconsidered in light of the need to be economically inclusive. For example, the school has moved away from a large auction and dinner dance as a fund raiser because it served to underscore the economic differences among the school community. Instead, the Parents Association sponsors a family fair that draws families from all campuses for a day of fun and activities. The auction is now held online. There are also opportunities for families from all campuses to come together for potluck dinners and joint worship services at one of the three campuses. Though two years remain until the students from both elementary campuses come together for middle school, the relationships among classmates at the two elementary campuses are deepening.

Communication: Increasingly, much of the school communication is handled electronically. Our website contains important information that is updated regularly. Furthermore, parents can access grades online and communicate directly with teachers via e-mail. Not all of the families at the urban campus, however, have access to the Internet. The school, therefore, must ensure that all electronic communications are also sent through the mail to those families without that access.

Perception: Despite the long-term focus of the school's vision for a diverse community, we must counter the possible perception that we are separating our elementary students based on socioeconomic status. In fact, there are many opportunities for students and families from all campuses to come together. In addition to field trips, rising third- and fourth-grade students from both elementary campuses attend a summer program designed to introduce them to the challenges and opportunities of the coming year.

Financial aid process: With many of the school families applying for financial aid, the school devotes time and attention to helping them with this complicated process.

Curriculum: In preparation for a more racially diverse upper school population, the school is exploring ways in which its curriculum can be inclusive of all students while it is enriched by the school's diversity. For example, courses in African-American literature and history are being planned for the future and will be available as electives.

Since the middle and upper school campus has a swimming pool and aquatics is a component of the middle school wellness curriculum, we have worked to ensure that all elementary students in third and fourth grades know how to swim before they get to sixth grade. The aquatics director provides swimming lessons to make sure that when they arrive at middle school, none of the students will be separated from their classmates by their lack of ability to swim.

Despite these and other challenges, the rewards associated with the school's expansion are numerous. People whose paths would not otherwise cross are joining together in shared learning experiences, field trips, athletic events, and a host of other activities designed to promote learning, respect, and mutuality. Education at St. George's expands beyond the classroom, preparing all of our students for a life of meaningful contributions in the global world of the 21st century. Through this process, St. George's is also working to make Memphis a less divided city one child at a time.

William W. Taylor is currently President of St. George's Independent School in Memphis, Tennessee, where he has served since 2001.