



GREENWOOD SCHOOL

Strategic Plan

October 28, 2011

Executive Summary

Since its founding in 1993, Greenwood School has seen significant changes as we have evolved from a homeschool into an independent, Preschool through Eighth grade school. Change has been essential throughout this process, and will continue to be as we increase in size and complexity in order to continue to serve the families and children who join our community.

Three years ago, we took a significant step in our growth by shifting our leadership model, giving the day-to-day running of the school to a School Director. In the creation of the Director position, the Board expressed a unanimous desire to create more clearly empowered leadership, in order to free the faculty to work on the educational task at hand, including self-development as well as pedagogical and child study. This change in our form initiated a profound cultural shift in our school community, which has been accompanied by some discomfort characteristic of organizational change. Despite the discomfort, these changes were necessary to lay the foundation for Greenwood School to thrive as a more complex organization, and meet the demands expected of the school in these times.

The implementation of a strategic plan always demands that an organization finds ways to shift processes, forms, and culture to ensure that it evolves to meet the challenges and achieves the goals it has identified. Greenwood School is no exception. Much of what we have identified in our plan requires us to think and act in new ways. It is important that we honor and respect our traditions, and at the same time consciously recognize and let go of those beliefs that may hold us back. We need to be awake to and aware of the changes being demanded of us, and embrace them as challenges to work through. This is a comprehensive plan designed to focus our activity and attention. It will be a living document that we discuss actively in the community, and update yearly.

Four key priorities will drive our work and resourcing plan in the shorter term:

1. Enhance and Support our Educational Programs

Refine and clearly articulate the curriculum and learning objectives for grades 1-8

- Refine and articulate curriculum standards and learning objectives for each grade
- Articulate expansion, overall goals, and integration of N.E.S.T. into the curriculum
- Evaluate the middle school curriculum as it reflects the school's mission and promise, ensuring student preparedness for a range of high school experiences

Student assessment and evaluations

- Develop consistent qualitative and quantitative measures of student outcomes based on school-wide learning objectives that are clearly articulated for grades 1-8
- Incorporate these measures of student outcomes into student evaluations sent to parents 2-3 times throughout the school year
- Conduct milestone assessments at key points in the students' development across years

Refine learning support program

- Articulate the role of learning support within Greenwood School, specifically, how it supports learning difficulties as well as accelerated learning, and how it integrates with the work of the class teachers

2. Build Enrollment

Create a more sizable pipeline to preschool, kindergarten, and 1st grade

- Secure an additional kindergarten and preschool (possibly satellite campuses)
- Expand the Early Childhood Program with the addition of a Parent Toddler Program.

Identify and cultivate different contact points

- Develop relationships with feeder schools in the Bay Area
- Form strategic alliances with groups that serve new parents
- Create a summer program and weekend family program

Improve admissions process

- Evaluate admissions process and gather more data on outcomes
- Implement Customer Relationship Management database

Strengthen parent confidence in Greenwood education

- Provide parents with extensive information about the goals of a Greenwood education
- Improve communication of educational program goals and expected learning objectives
- Improve reporting of student outcomes using both qualitative and quantitative measures
- Focus on key transition points: preschool to K, K to 1st, 5th to 6th

3. Strengthen Financial Position

Create balanced budget

- Implement firm policies at the board level requiring every operating budget to be balanced. Deficits should only occur via unexpected revenue shortfalls/expenses. The school may not run any structural deficits that are planned into any approved operating budget.

Create second-generation development plan

- Redefine Board Development Committee focus to include patron donors, grants, strategic partnerships, capital campaign and endowment
- Create part-time position to handle all day-to-day development activities. Establish financial goals to ensure net return on position is achieved. Position to be included in the Development budget.
- Strengthen Development committee to spread workload and support long-term plan

4. Improve Facilities

Address Current Site

- Complete work to address current Buena Vista site maintenance/upgrade issues, including front garden, back play yard, roof, windows, mud room, and storage
- Examine potential sites for additional kindergarten and preschool
- Assess needs of expanding middle school (e.g. sports facilities and science laboratories)

Organize and Optimize Facilities Available

- Using estimates for enrollment and program needs, develop optimal campus layout with on site and off site satellites

Greenwood School Mission

Greenwood School is grounded in the wisdom of Waldorf educational philosophy and embraces best contemporary educational practice. We offer a rich experiential and academic curriculum from early childhood through eighth grade. Our program cultivates imagination, love of nature, and the spirit of inquiry.

The Greenwood School community of families, faculty, and staff shares a deep commitment to creating a healthy foundation for every student's emotional, intellectual, social, physical, and spiritual growth.

Our graduates distinguish themselves in and beyond high school as independent, creative thinkers who act with integrity and make a positive contribution in our world.

Core Values

Greenwood School is committed to:

Academic excellence achieved through developmentally appropriate curriculum and teaching methods.

Engagement with diverse spiritual and cultural traditions.

Reverence for nature and stewardship of the earth.

Respect and compassion for others.

Media and technology exposure limited to that which supports emotional, social, and intellectual development.

The Greenwood Promise

Greenwood School prepares students for secondary school and for life. We promise to:

Provide a broad-based, integrated curriculum including math, sciences, humanities, foreign language, and the arts.

Offer experiential learning opportunities that support and enhance the academic program, engage children with nature, and build social skills.

Cultivate students' initiative, collaboration, self-confidence and ethical behavior.

Assess and identify children's learning differences and work with parents to assure they can be met.

Assure a safe, nurturing environment.

Foster a community of parents, teachers, staff, students and alumni who enrich one another's lives.

Strategic Plan

Strategic Initiative: Enhance and Support our Educational Programs

Continually enhance and secure support for educational initiatives, recognizing that our mission is to combine the beauty and wisdom of a Waldorf curriculum with the best of contemporary educational practice and a modern understanding of nature and humanity.

Initiatives	Priority
<p>Clearly articulate the curriculum for grades 1-8</p> <ul style="list-style-type: none"> • Refine and articulate curriculum standards and learning objectives for each grade • Articulate expansion, overall goals, and integration of N.E.S.T. into the curriculum • Evaluate the middle school curriculum as it reflects the school's mission and promise, ensuring student preparedness for a range of high school experiences 	<i>Priority 1</i>
<p>Student assessment and evaluations</p> <ul style="list-style-type: none"> • Develop consistent qualitative and quantitative measures of student outcomes based on learning objectives articulated for grades 1-8 • Incorporate measures into student evaluations sent to parents 2-3 times throughout the year • Conduct milestone assessments at key points in the students' development 	<i>Priority 1</i>
<p>Refine learning support program</p> <ul style="list-style-type: none"> • Articulate role of learning support within Greenwood School, specifically, how it supports learning difficulties as well as accelerated learning, and how it integrates with the work of the class teachers • Make decision about tutoring support "in house" for families through an after school program 	<i>Priority 2</i>
<p>Create middle school media and technology literacy program</p> <ul style="list-style-type: none"> • Determine best ways to teach media and technology literacy to middle school students 	<i>Priority 2</i>
<p>Explore possibility of pursuing accreditation</p> <ul style="list-style-type: none"> • Research the criteria required by possible accreditation entities (WASC, NAIS, AWSNA, CAIS, etc.) • Consider and discuss pros and cons of accreditation 	<i>Priority 3</i>

Strategic Initiative: Support and Capacity Building for Faculty and Staff

Employ an exceptional faculty and staff dedicated to supporting the school's mission to offer a Waldorf-inspired education with the best of contemporary educational practice and build a vibrant school community.

Initiative	Priority
<p>Professional Development</p> <ul style="list-style-type: none"> • Increase support for faculty to participate in professional development opportunities individually and collectively • Ensure faculty and staff have a professional development plan relevant to their job duties and performance review • Provide ample opportunities for administrative staff to participate in professional development training relevant to the skills necessary to perform their duties • Create a system of monitoring of research and education trends, along with a process for assessing and incorporating best educational practices into the Greenwood curriculum 	<p><i>Priority 1</i></p>
<p>Employee Recruitment, Hiring and Retention practices</p> <ul style="list-style-type: none"> • Ensure clear job descriptions, requirements and employee expectations are in place to facilitate effective recruitment and hiring • Establish diverse recruitment sources and strategies • Articulate and communicate generous salary and benefits • Establish relationships with Waldorf training institutions and professionals 	<p><i>Priority 1</i></p>

Strategic Initiative: Define and Promote Greenwood Approach

Using our core values and mission statement as a guide, develop communication tools that articulate Greenwood's educational philosophy, curriculum, pedagogy, and methods. Once properly articulated, use this document to inform marketing, outreach, enrollment, branding, development and hiring.

Initiative	Priority
Develop Framework <ul style="list-style-type: none">• Develop framework of the document and determine what work needs to be done by the various constituencies in order to fully and clearly articulate what we stand for	<i>Priority 1</i>
Create the Platform <ul style="list-style-type: none">• Over the course of 2011-12, flesh out the framework and write the document that will clearly and in a detailed manner outline what the Greenwood approach is and what it means for students, faculty, and parents	<i>Priority 2</i>

Strategic Initiative: Build Enrollment

Attract and retain children and families that share Greenwood School values, and achieve a level of enrollment that is consistent with financial and pedagogical health.

Initiative	Priority
<p>Explore ways to create a sizable pipeline to preschool, kindergarten, and 1st grade</p> <ul style="list-style-type: none"> • One additional kindergarten and preschool • Early Childhood Program • Satellite preschools 	<p><i>Priority 1</i></p>
<p>Identify and cultivate different contact points</p> <ul style="list-style-type: none"> • Develop relationships with feeder schools, e.g., SF Waldorf, Mountain School, local preschools • Form strategic alliances with groups that serve new parents, e.g., S. Marin Mothers Club • Create a summer program and weekend family program, e.g., puppet shows, craft circles 	<p><i>Priority 1</i></p>
<p>Improve admissions process</p> <ul style="list-style-type: none"> • Evaluate admissions process beginning to end • Implement current Customer Relationship Management database 	<p><i>Priority 1</i></p>
<p>Build awareness and understanding</p> <ul style="list-style-type: none"> • Develop an integrated communications plan <ul style="list-style-type: none"> ◦ Evaluate advertising print program and explore other awareness generators, e.g., direct mail; press releases on key events, happenings, changes; regular and consistent social media communication; continued dialogue with parents who have expressed interest in school • Create Parent Enrichment program geared towards parents outside the community, e.g., inspiring speakers, provocative topics, emphasis on NEST, evidenced-based speakers • Create grass roots campaign to speak to local businesses about the school • Evaluate feasibility of reinvigorating Greenwood Naturals 	<p><i>Priority 1</i></p>
<p>Keep parents engaged and satisfied</p> <ul style="list-style-type: none"> • Implement Annual Parent Survey • Manage parent expectations both on arrival and throughout child(ren)'s enrollment • Formalize Class of 2016 "Uncles" program • Significantly improve calendar management • Create parent workload reduction initiative • Promote and recognize volunteerism • Create induction program for new families and ensure they are well-integrated <ul style="list-style-type: none"> ◦ Create mechanism to incorporate preschool families 	<p><i>Priority 1</i></p>
<p>Strengthen parent confidence in Greenwood education</p> <ul style="list-style-type: none"> • Provide parents with extensive information about the goals of a Greenwood education <ul style="list-style-type: none"> ◦ Articulate connection between current research and Greenwood approach • Improve communication of goals and expected learning objectives • Improve reporting of student outcomes • Focus on key transition points: preschool to K, K to 1st, 5th to 6th 	<p><i>Priority 1</i></p>

Strategic Initiative: Strengthen Financial Position

Provide a solid short-term foundation for the on-going operation of the school through clear budgeting policies that support near-term objectives of the school. Build a financial base that supports long-term objectives. Create a transparent decision-making body so constituents understand sources and uses of funds.

Initiative	Priority
<p>Create balanced budget</p> <ul style="list-style-type: none"> • Implement firm policies at the board level requiring every operating budget to be balanced. Deficits should only occur via unexpected revenue shortfalls/expenses. The school may not run any structural deficits that are planned into any approved operating budget. 	<i>Priority 1</i>
<p>Create second generation development plan</p> <ul style="list-style-type: none"> • Redefine Development Chair duties to include patron donors, grants, strategic partnerships, capital campaign and endowment <ul style="list-style-type: none"> ○ Create part-time position to handle all day-to-day development activities. Establish financial goals to ensure net return on position is achieved. Position to be included in the Development budget. ○ Strengthen Development committee to spread workload and support long-term plan 	<i>Priority 1</i>
<p>Implement accounting software</p> <ul style="list-style-type: none"> • Explore the implementation of new accounting software to receive timely financial statements that conform to all requisite accounting rules (i.e. accrual based statements, proper revenue recognition on a monthly basis, etc.) 	<i>Priority 2</i>
<p>Improve financial process</p> <ul style="list-style-type: none"> • Define and implement A/R and Collections Management policies • Develop and communicate overall annual finance calendar • Develop list of Management Reports needed and implement as software and processes allow 	<i>Priority 2</i>
<p>Strengthen Tuition Assistance</p> <ul style="list-style-type: none"> • Expand and strengthen tuition assistance program • Add scholarship program <ul style="list-style-type: none"> ○ Develop budgetary targets that are included in the operating budget for TA and scholarships as a percentage of tuition revenue 	<i>Priority 2</i>
<p>Develop 5-Year Financial Plan</p> <ul style="list-style-type: none"> • Develop initiatives that strengthen programs and raise quality level of education. Board of Trustees to prioritize and Finance Committee to develop a 5-Year Financial Plan which: <ul style="list-style-type: none"> ○ Supports all stated initiatives as prioritized ○ Quantifies overall costs and budgetary impacts of each initiative ○ Includes explicit list of assumptions (goals) to be met to achieve stated financial objectives, to ensure support of all strategic initiatives • Annually, Board to review financial results and related impact on plan and make adjustments as needed 	<i>Priority 2</i>
<p>Endowment</p> <ul style="list-style-type: none"> • Begin process of building an endowment with initial focus on tax and estate planning. Not to take away from efforts to build reserves. <ul style="list-style-type: none"> ○ Launch at the board level as resources allow. Will take several years to establish. 	<i>Priority 3</i>

Strategic Initiative: Improve Facilities

Develop short- and long-term plans to secure the facilities needed to support the goals of the school as outlined in the strategic plan.

Initiative	Priority
<p>Address Current Site</p> <ul style="list-style-type: none"> • Complete work to address current Buena Vista site maintenance/upgrade issues, including front garden, back play yard, roof, windows, mud room, and storage 	<p><i>Priority 1</i></p>
<p>Site Funding Feasibility Study – In Conjunction with Development Plan</p> <ul style="list-style-type: none"> • Evaluate alternative sources of funding (grants, foundation, bond financing, etc.) and make recommendations 	<p><i>Priority 2</i></p>
<p>Assessment of Current Site (Short-term, 5 years)</p> <ul style="list-style-type: none"> • Work with Enrollment Initiative to develop enrollment projections for the next five years (2012-2016), to support long-term planning effort • Using estimates for student enrollment, planned programs (indoors and outdoors), safety, and other considerations, assess current state of facilities and identify space and resource needs/gaps. Incorporate green technologies and practices wherever possible. <ul style="list-style-type: none"> ○ Early Childhood ○ Lower ○ Middle • Obtain and update site assessment done five years ago • Prioritize which programs should be main campus vs. off site and develop options for off-site locations • Develop short-term plan, in conjunction with 5 year financial plan, that includes: <ul style="list-style-type: none"> ○ Needs ○ Options ○ Sites ○ Occupancy • Monitor potential development at Redwood Lodge and if appropriate identify alternative outdoor space(s) for festivals and woodworking 	<p><i>Priority 2</i></p>
<p>Creation of Long-term Plan</p> <ul style="list-style-type: none"> • Based on funding approach developed by feasibility study, develop and socialize long-term site plan • Oversee execution of long-term site plan 	<p><i>Priority 3</i></p>