



# SFWS STRATEGIC PLAN 2020: ENVISIONING OUR FUTURE

## **Introduction**

San Francisco Waldorf School was founded in 1979 as an independent school within the rich Waldorf tradition. It is one of more than 1,000 Waldorf Schools worldwide and one of 170 in North America.

The School is fully accredited by the Western Association of Schools and Colleges (WASC) and the Association of Waldorf Schools of North America (AWSNA).

Originally founded by a small group of committed faculty and parents, the school has grown to an organization serving more than 470 students on three campuses. Beyond that, it represents a cultural focal point for many community members.

The Board of Trustees and College of Teachers launched the Strategic Planning process in 2009 in order to publicly articulate the school's long term ambitions and to more efficiently and effectively guide SFWS into the next decade of the 21st century.

Feedback from a wide segment of the community has been essential for assembling a plan that lays out some of the big ambitions we have for our school—and thus our students—going forward. The SP committees held two public input sessions and conducted an online public survey in 2009-2010 to explore community members' ideas about major issues facing the school over the next ten years. Following that, members of the Board of Trustees, College of Teachers, Administration, and parent community collaborated on a final Strategic Plan.

The Board, College, and Administration adopt this Strategic Plan, which will complement our WASC and AWSNA accreditation processes, with the intention and understanding that current and future leaders will use it to guide the vision of the school over the next ten years. This guidance will include the development of a detailed action plan to specify the long-term (10 year) vision and medium term (3-5 year) goals, as well as an annual review and evaluation of the plan's overall progress. The Board may also call on the College and Administration to undertake more extensive evaluation of the plan, or even revisit and modify aspects of it, as circumstances dictate in the future.

Readers of the plan should note that the 2020 “vision” summaries and statements correspond with what the governing spheres agree are the school's 10 year (2020) strategies, with subheadings as “directional signposts” for each topic. “Goals” are the more immediate 3-5 year aims for achieving these visions.

We are grateful to the large number of our constituents who contributed to this plan.

Michael Gowe  
President, SFWS Board of Trustees

Mike Zatopa  
Chair, Strategic Planning Committee

Dan Ingolia  
Head of Administration

Karen Apana  
Chair, College of Teachers



## MISSION OF SFWS

*With love and devotion, we strive to nourish  
the unique capacities of every student  
that in each may awaken  
the critical and creative intelligence to envision the future  
the compassion and commitment to understand others  
and the courage to be a free and active participant  
in our common human experience.*



At San Francisco Waldorf School, our dedicated faculty and staff work together with parents to foster each student's sense of self-reliance, social responsibility, and moral purpose.

The diverse cultures and individuals represented in our school community are a source of invaluable human experience from which our students and the entire community learn and grow. We aim to encourage young people to bring the highest human capacities into their adult lives, as they become world citizens of the future.



## EDUCATIONAL PHILOSOPHY

Waldorf education is based on Austrian philosopher Rudolf Steiner's careful study of child development. Steiner founded an education that meets the cognitive, physical, developmental, emotional, and spiritual needs of each student. Rather than stressing externally driven data acquisition, we emphasize students' inner growth toward self-reliance, resilience, and creative intelligence. SFWS students embody these traits, which are developed through careful attention to their unfolding growth and capacities over time.



Like all K-12 Waldorf schools, SFWS's curriculum addresses three discrete stages of child development.

- Between birth and age seven, children learn primarily through imitation, and through an emphasis on physical activities. The atmosphere surrounding the child is filled with beauty, goodness, and role models worthy of imitation. At this age children need warmth and protection to develop their capacities in a natural, non-competitive atmosphere for creative play and work.



- Children between the ages of seven and fourteen learn best from loving and consistent authority figures that embrace the world with interest. At this age subjects are presented in a lively, artistic, and engaging way in order to ignite children's enthusiasm for learning the academic, emotional, practical, and physical skills they will need for life.



- High school students learn best from experts in their fields with whom they can exercise their independent thinking and pursuit of truth. At this age students deepen their understanding of the world and of themselves. Through challenging intellectual study, they begin to master a wide range of subjects from mathematics to music, from science to humanities, from art to physical education.



## STRATEGIC PLAN OVERVIEW:

As a rough organizing principle for our Strategic Plan we adopted Rudolf Steiner's ideal of the 3-fold social model of interconnected—yet independent—aspects of an organization. Each aspect or sphere of our school and community is connected to and dependent on the other spheres, but no one sphere dominates.

Each sphere represents essential aspects of life in a social organization: Cultural Life represents free expression of one's individual nature, as exemplified by Waldorf education's emphasis on creating free thinkers using life rhythms and inner growth as guides; the Life of Rights represents equality of each individual's opportunity within community, exemplified by the institutional emphasis on inclusiveness in decision making; Economic Life represents the associative quality of transaction inherent in the school, exemplified by our emphasis on human relationships (teacher-student-parent) as the foundation of economic sustainability.

Each of the spheres below contains essential values that SFWS's community has identified as underpinning and supporting our mission, and thereby underpinning and supporting our aspirations for the school over the next 10 years.

### San Francisco Waldorf School Threefold Social Model

#### Cultural Life

represents free expression of one's individual nature, as exemplified by Waldorf education's emphasis on creating free thinkers



#### Life of Rights

represents equality of individual's opportunity within community, exemplified by the institutional emphasis on inclusiveness in decision making

#### Economic Life

represents the associative quality of transaction inherent in the school, exemplified by our emphasis on human relationships (teacher-student-parent) as the foundation of economic sustainability.



## **Context:**

San Francisco Waldorf School's programs are the heart of the school's mission to educate and guide children into becoming free-thinking adults. The core program is based on time-tested curriculum indications given by Rudolf Steiner. It centers on a developmental approach to learning, and a holistic engagement of students' heads, hearts, and hands that cultivates analytical engagement and global consciousness.

Offering Waldorf education in our modern culture is both invigorating and challenging. As we move into the second decade of the 21st century in a large urban setting, SFWS continues to evaluate its curriculum and approaches to best serve its families, community, and most importantly, its students. This will ensure that the community's core values and vision continue to sustain the school through the social and cultural changes arising this decade and beyond.



These issues, from increasing media exposure to high density living to increasingly complex cultural diversity, can be successfully navigated through community dialogue, exploration, and a firm commitment to the holistic development of our children. For example, educational research increasingly validates SFWS's emphasis on reducing or eliminating younger children's exposure to media, yet the larger culture exposes our students to increasing amounts of it. Parents and educators must continue to communicate and explore ways of managing such exposure while recognizing how these issues become more challenging as children grow into adolescence.



## **Vision:**

As SFWS moves into the next decade of the 21st century, the school's core program of developmental, holistic, and anthroposophically-grounded education will continue to be interpreted and delivered in light of cultural, demographic, and technological changes.

## **Goals:**

- o Enhance and deepen the work of the faculty, focusing on best practices in Waldorf education, evaluation and mentoring, inner work, and defining the role of the class teacher in the grade school
- o Enhance and deepen assessment of student learning outcomes across the grades
- o Create or enhance specific curricular areas, including but not limited to health and wellness education, world languages, media literacy, ecological stewardship, community service/outreach, internships, outdoor education, and the interweaving of multicultural issues across the curriculum
- o Continue developing, formalizing, and communicating educational support services across the curriculum
- o Research, clarify, and communicate the relationship with and use of technology at SFWS in education and community life
- o Continue to explore opportunities for expanding high school international and exchange programs
- o Expand educational opportunities for parents and constituents

# RELATIONSHIPS *(Creating and Maintaining)*



## **Context:**

SFWS's community is an engaged, committed, and diverse group of people who share a common interest in Waldorf education. For the 2010-11 academic year, SFWS drew students from 23 Bay Area communities: from Novato to the north, Walnut Creek to the east, and Half Moon Bay to the south. The student body is ethnically and economically diverse: 27% of students are underrepresented minorities and 36% of families receive financial assistance.

The school's Multicultural Council has organized several events to raise awareness of multicultural issues as well as develop institutional awareness and representation. Faculty and staff actively strive to incorporate multicultural content and practices into the curriculum.



Parent organizations at the grade school and high school support educational opportunities and community dialogues on topics ranging from healthy nutrition for babies to media literacy for teens. Our community participates widely in and volunteers for numerous lectures, festivals and school assemblies each year. A strong high school Community Service Learning Program facilitates students' service in a wide variety of local nonprofit organizations.



Although community engagement has increased over the last several years, more can be done to educate our community about Waldorf education and to be more inclusive, transparent, and comprehensive in our approach to building community relationships.

## **Vision:**

SFWS must continue engaging the internal and external community through enhanced communication, education, acculturation, and outreach, as well as by offering opportunities for dialogue and an authentic sense of inclusion among all constituents. Multiculturalism must be embraced as a strengthening principle across all aspects of the institution.

## **Goals:**

- o Continue to promote and refine communications with students, parents, alumni, and other school constituents so they perceive and experience a “feedback loop”
- o Understand, embrace, and promote multiculturalism as a core value of Waldorf education — acknowledging the contributions and interests of many groups and individuals — as the underpinning of who we are, and how we teach, conduct business, and engage with others
- o Actively recruit more diverse faculty, staff, and families
- o Broaden SFWS's outreach beyond the school community by pursuing and engaging in meaningful and productive partnerships with businesses and organizations in the San Francisco community around common interests
- o Achieve multi-generational, long-term connection with the school by developing the SFWS Alumni Association and possibly an Alumni Friendship Council (for all former and current community members)
- o Explore the vision of “One School-One Community” with shared values across the grades, integrated branding and messaging, integrated programs, and joint activities to build bridges of understanding between both campus communities.

# GOVERNANCE *(Agreements and Leadership)*



## **Context:**

SFWS was founded in 1979 by a small group of committed faculty and parents, many of whom remain active in the community. Since then the school has grown in to an organization serving more than 470 students on three campuses, and has become a cultural focal point for Waldorf education in the Bay Area.

The school's major governing spheres are: the **Board of Trustees**, which oversees the school's overall fiscal, legal, and structural health; the **College of Teachers**, which sets and manages pedagogy and student life, and the **Head of Administration**, who is the public representative of the school and oversees daily operations. All three groups strive for consensus on the school's major policies, and thereby on the character of the organization.

As the student/family population has grown, institutional complexity has increased. This increased complexity requires greater responsiveness, timely, thorough, and effective communication, and efficient professionalism from the school's governing bodies.

## **Vision:**

As the school "grows into its body" the governing spheres of the Board, College, and Administration must operate well within a framework of agreements that result in a professionally managed institution that can fully realize its mission and values.

## **Goals:**

- o Continue realizing an organizational and administrative structure that enables timely responsiveness, transparency, and accountability
- o In light of the significant growth and current needs of the school, large governing bodies must retain broad policy setting authority, but mandate and delegate more implementation and execution of policies to smaller groups or individuals
- o Formalize faculty, administrative, and staff responsibilities to address the need for efficiency as well as increased specialization and professionalism
- o Recognize the parent body as an important voice in school decisions; promote the accessibility and effectiveness of the parent representative bodies
- o Continue improving Board development through effective recruitment and orientation of new Trustees, as well as clear policies designed to increase the efficiency, effectiveness, and imaginative leadership of all aspects of board work



# ADVANCEMENT *(Engagement and Outreach)*



## **Context:**

Since its founding, the school has benefited from an enthusiastic and dedicated community of volunteers, as well as from the generous support of major benefactors. SFWS's primary fundraising effort, the Annual Fund, enjoys participation rates approaching or exceeding 90%, with solid annual increases in total contributions. The school also receives financial support for specific activities and/or needs as they arise. In 2006-2007 a \$2.5M Capital Campaign to purchase and renovate a new high school ultimately raised \$3.3M, demonstrating the potential strength of philanthropy in our community.



Despite the age of the school, modern marketing — outreach beyond the community — is relatively new to SFWS. The message or brand of SFWS has sometimes been perceived as unclear and at times misperceptions have hampered outreach efforts. It can be challenging to encapsulate the way Waldorf education works. Yet mainstream educators increasingly recognize its core approach and values as highly effective and healthy. We must more effectively integrate this professional recognition into our outreach and communication efforts.



## **Vision:**

SFWS must establish a strong culture of philanthropy and enhance annual and long-term support from its community, including alumni and alumni parents. The school should complete successful campaigns for capital projects and endowment. SFWS should also become an established brand and recognized institution as a leader in education in the SF Bay Area independent school market. It should be at the forefront of North American Waldorf schools in communicating its identity and articulating its mission.

## **ENGAGEMENT/DEVELOPMENT**

### **Goals:**

- o Create a stable and sustainable model for fundraising and community engagement in order to more fully realize donor potential. Adjust operations and messaging to instill strong donor confidence in the school, including strengthening the Major Gifts program to identify and steward donors
- o Increase overall effectiveness, sustainability, and scalability of the Advancement office through improvements and investments in technology and additional staffing
- o Move Annual Fund support toward 100% and increase amount by 25% over the next 3-5 years
- o Increase alumni engagement and giving by 25% over the next 3 years
- o Prepare and launch a major Capital Campaign focused on endowment and/or the capital investment needed to build Phase II of the High School and/or Grade School campus renovations
- o Evaluate and initiate grant/foundation support for specific projects that meet funders' guidelines, including but not limited to gardening, arts, athletics, and scholarships for underrepresented students

## **OUTREACH**

### **Goals:**

- o Develop a clear and compelling brand and targeted messaging of our shared values and attributes
- o Develop an overarching marketing plan with specific goals so that SFWS becomes an increasingly recognized institution in the SF Bay Area independent school market

# SUSTAINABILITY *(Financial, Facilities, and Environmental)*



## **Context:**

In 2006 SFWS successfully invested in a major facility expansion through a \$14M bond issue. In 2007 the high school moved into a large multi-story building that was purchased and extensively remodeled to accommodate 220 students. Bright classrooms and offices, as well as state-of-the-art labs for chemistry, biology, and physics make it a very attractive facility. This beautiful new high school building will soon be the first LEED certified (gold) school building in San Francisco.



Our commitment to environmental stewardship is demonstrated in several emerging programs. In 2006 we established an outdoor gardening program with St Anne's Home for our kindergarten classes; in 2009 that program was expanded to the early grades. In 2010 we established a biodynamic garden and farm program for our high school students at Laguna Honda Hospital.



We have traditionally focused on attracting and retaining talented faculty and staff to sustain our excellent program, and we have largely succeeded. The stability of our staff reflects their strong commitment to the education and to their students, which has helped spur steadily increasing demand for Waldorf education, especially in the early grades.



Tuition increases in the last few years have been moderate, recognizing that escalating costs for private education are unsustainable. We have instead focused on streamlining administration, management, and organization. At the same time, we have also worked to make our education more widely available by offering financial support to 36% of our families. This tuition assistance includes a full-tuition high school scholarship program for traditionally underrepresented and needy students, promoting socio-economic and cultural diversity.



Despite the additions and improvements to the physical plant, the quickly growing number of students constitutes a significant challenge to the school's current facilities. This challenge, coupled with the need to steadily increase salaries and benefits to attract and retain the next generation of high quality teachers, will require concerted and effective financial planning, participation, and leadership over the next 10 years.



Though the school does not have a substantial endowment compared with many other SF independent schools, we have a committed and generous body of parents, alumni, and friends. Part of our long-range goal must be to build on this foundation, which would facilitate enrollment growth and future capital investments.

## **Vision:**

SFWS must improve and expand our facilities to accommodate future growth, with the goals of building out the high school enrollment and facility. We must continue to examine the viability of a double-tracked grade school. We must also offer adequate salaries and benefits to our faculty and staff, and develop a substantial endowment that will act as a financial backbone to sustain the school in the future.

**Goals:** *(see reverse)*

## Goals:

- o Continue to strengthen the school's enrollment efforts, especially the middle and high schools. Grow high school enrollment by at least 25% over the next 10 years, while addressing and responding quickly to retention problems
- o Continue to explore the concept of a sister grade school, conducting a market study and evaluating the effects of double-tracking the grade school program to meet the high demand for Waldorf education in the Bay Area
- o Further develop our leadership in green building and sustainable living practices by incorporating green principles of design into future facilities projects
- o Stress the importance of a substantial endowment as a financial backbone for the School, with the goal of significantly increasing the endowment
- o Evaluate the tuition assistance program in order to achieve a balance between long term financial sustainability and the school's commitment to supporting demographic diversity among its families
- o Continue to explore Phase II high school build out options, in conjunction with a possible capital campaign or bond refinance
- o Raise faculty, staff, and administrative salaries and benefits (considering tuition remission) to levels more commensurate with the cost of living in the Bay Area, and more competitive with other independent schools in San Francisco

# MISSION, VISION, VALUES COMMITTEE



## **APPRECIATION**

It is with great thanks that we mention the community members who participated in the Strategic Planning Process. Your commitment to the school and its future is much appreciated.

## **BOARD OF TRUSTEES**

Art Bender, Ben Trefny, Craig Appel, Deborah Kushner, Diane David, Geoff Bennett, John Froley, Lala Mejia, Michael Gowe, Mike Zatopa, Paul Hurley, Paul Salazar, and Sheila Schroeder

## **COLLEGE OF TEACHERS**

Amy Van der Wyk, Astrid Thiersch, Caroline Alba, Corinne Fendell, Cynthia Renegar, Dagmar Eisele, Dan Ingoglia, David Weber, Deborah, Krikorian, Diane David, Elena Forrer, Ellie Capers, Erin Kemp, Heidi Schwarzenbach, Joan Calderera, John Burket, Karen Apana, Lalla Carini, Laurence Jaquet, Lisa Sargent, Mary Baryhdt, Monique Grund, Nick Wong, Paolo Carini, Patty Townsend, and Susan Cook

## **STRATEGIC PLAN SUBCOMMITTEES**

**Mission, Vision, Values Chair:** Adelaida Mejia (Lala)

**Enrollment and Outreach Chair:** Renee Jordan

**Finance and Human Resources Chair:** Gerhard Engels

**Facilities Chair:** Mike Zatopa

**Community Chair:** Dan Ingoglia/Dave Alsop

**Programming Chairs:** Ellie Capers and Susan Cook/ Erin Kemp

**Development Chair:** Mitch Mitchell

## **MISSION, VISION, VALUES COMMITTEE PARTICIPANTS**

### **Committee Chairs:**

Lynn St. Albus and Adelaida Mejia

### **Core Group:**

Lynn St. Albus, alumni parent, past Vice President Board of Trustees SFWS; Sherril Brennan, faculty; Patrick Markle, parent; Adelaida Mejia, parent, Board of Trustees SFWS; Siri Vedyia Singh, alumni parent

### **Shared Community Values Participants:**

Juan Carlos Escobar, parent; Kate Green, parent; Margaret Dow, parent; Dan Ingoglia, Head of Administration; Maria Iorillo, parent; Dana Jain, parent; Renee Jordan, parent, previous President Board of Trustees SFWS; Julie LaCap, parent; Monica Leicht, parent, Multicultural Council; Janice Vorfeld, parent, Co-chair Parent Association; Leslie Zimmerman, parent, High School Parent Council

### **SFWHS Interviewees on School Values:**

Caroline Alba, faculty; Barbara Allen, administrator; Kathryn Brennan, alumni; Sherril Brennan, faculty; Wayne F. Burton, student; Arran Caddy, student; Velia de Iuliis, student; Rose Hartley, student; Reilly Hogan, alumni; Tao Kawase, student; Sierra Kemp, student; Dharma Khalsa, student; Evelyn Levine, student; Cynthia Renegar, faculty; Siri Vedyia Singh, parent; Ethel Tang Quang, parent; Mary Whitten, parent; Robert Whitten, parent; Nicholas Wong, High School Dean; Merlin Woodman, student

## **OTHER PARENT, TEACHER, AND STAFF STRATEGIC PLAN PARTICIPANTS**

Brian Markworth, Charlene Davis, Cindy Bennett, Cory Powers, David Bushnell, Elizabeth Halifax, Ellen Stephens, Gail Gurewitz, Hugh Molesworth, Jodi Casey, Karen Staller, Kelly Kim, Lisa Berry, Lori Grey, Lynn Elliot-Harding, Mac Hartley, Mary Wallace, Paula McCabe, Stacey Hubbard, Steve Gallardo, Todd Oppenheimer

**And to all those who took the time to fill out surveys and otherwise participate  
in this process we give our heartfelt thanks.**