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# Strategic Plan

**2011 - 2014**

**Adopted June 2011**

## Planning Team

Prepared by the 2010 – 2011 Spruce Street School Board of Trustees

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## Mission

Spruce Street School is a nurturing educational community that instills in a broad range of children the social, emotional, and intellectual skills for lifelong participation in a diverse society.

## Core Values

*Community:* Children derive great benefit from being part of a strong, safe, nurturing school community. Our students feel known, valued and respected. We also believe that it is important for students to feel connected and able to contribute to the larger community around us. Towards this end, we provide opportunities for students to participate in a variety of service learning projects.

*Diversity:* Diversity of all kinds—including cultural, ethnic, racial, economic, family structure, sexual orientation, learning style, beliefs and abilities—in an educational community enhances the richness of everyone’s educational experience. We are committed to embracing a broad range of students and families. We proactively teach and model respect and appreciation for all people and for the differences among us.

*Social/Emotional Development:* A child’s social and emotional development is as important as their academic progress. Our community actively promotes the development of positive, respectful relationships among students and staff. We teach children (through curriculum and modeling) to recognize and respect their own feelings and the feelings of others. We emphasize collaboration in work and play. We teach and make use of conflict resolution skills in daily school life.

*Differentiated, Integrated Instruction:* All children have strengths, challenges, and different ways of learning. Our teachers recognize and honor these differences, creating an integrated curriculum and a rich educational experience that is meaningful for each individual student. A true understanding of each child and high expectations help ensure that every child is able to realize his/her own potential.



## Strategic Planning Background

In 2010, the Spruce Street School board explored a vision for a new, long term “North Star” for the school. For six months, the board considered deeply the school’s amazing history, enduring strengths, the current and long-term context of education, and opportunities for the future.

As the Board looked 25 years into the future, three important themes emerged: transitioning from renting to owning a school building, sustaining and enhancing teacher excellence, and enriching the economic diversity of the school community by building an endowment for tuition assistance. Because all three of these themes were envisioned as core parts of Spruce Street School’s future, choosing a single “North Star” was difficult.

## Choosing Our Long Term Focus through 2035

While all three goals will require attention over the next 25 years, the board felt two of the three goals – securing a school building and sustaining and enhancing teacher excellence - were already well underway. For example, our current location at 914 Virginia Ave was renovated to our specification in 2005 and is secured by a long-term lease expiring in 2030. Our board’s current practice of building a facilities reserve, if diligently continued in successive strategic plans, is expected to fund future facilities needs. Also, our school is consistently recognized for teachers who are highly qualified and well compensated for the Seattle market. Yet, for many families whose children would be a good fit for Spruce Street School, our tuition is perceived to be out of reach, even with our current available financial aid.

After much discussion, research and reflection, the Board adopted a long-term goal of building an endowment for tuition assistance as our new north star for 2035. The board unanimously passed a resolution to that effect on April 21, 2010 (see Appendix A for a copy of the resolution).

## Year 2035 Long Term Organizational Vision

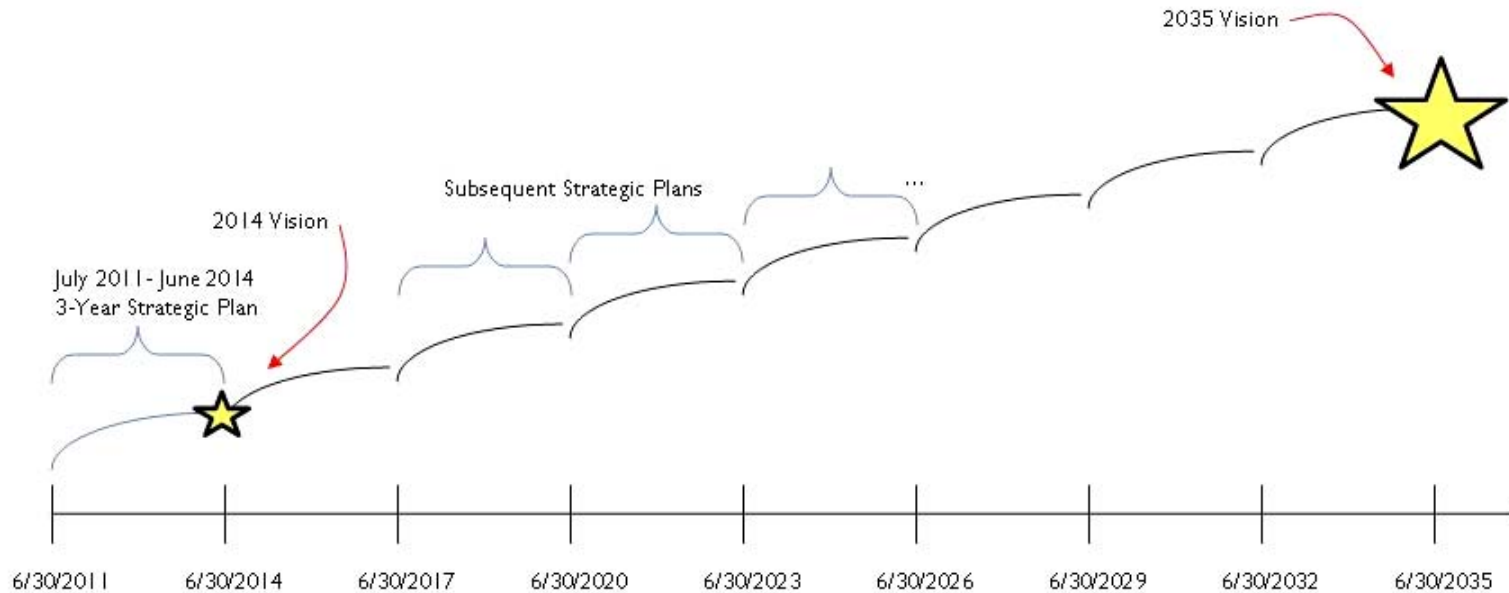
*“By 2035, Spruce Street School will be the highest quality, most financially accessible K-5 independent school of its kind in the Seattle area – able to admit children who would thrive in our educational program and community, regardless of their families’ ability to pay. In addition, we will continue to be distinguished for our unique program and excellent teachers.”*



Publishing party book sharing

## Strategic Planning for 2011-2014

In 2011, the board set about developing a three-year strategic plan to make strides toward this long-term vision, while ensuring we maintain teaching excellence and provide for our facilities needs. The following diagram shows how the regular strategic planning cycle supports progress toward the long term vision by breaking down the planning in 3-to 5-year increments.



## Year 2014 Organizational Vision

*“By 2014, inspired by the passion and the energy of excellent teaching and the unique educational experience that results, Spruce Street School will have performed the necessary steps to launch a successful tuition endowment campaign and will have begun to build the endowment toward the 2035 vision.”*

## Strategic Goals for 2011-2014 Strategic Plan

The following section outlines three strategic goals for achieving the 2014 vision and beginning down the path toward the 2035 vision. The board recognizes that building a tuition endowment requires a strong program based on attracting and supporting excellent teachers while managing our finances in a way that builds long-term financial stability.

Marimba  
performance



## Endowment Strategic Goal

*“Build an endowment to sustain and provide long-term support for financial aid at Spruce Street School”*

*Rationale:* Our new “North Star” resolution recognizes in our mission that we seek to “instill in a **broad range** of children the...skills for lifelong participation in a **diverse** society.” Diversity, as evidenced by one of our core values, is understood to include economic diversity:

*“Diversity of all kinds—cultural, ethnic, racial, **economic**, family structure, learning style, interests and abilities—in an educational community enhances the richness of everyone’s educational experience. We are committed to embracing a broad range of students and families. We proactively teach and model respect and appreciation for all people and the differences among us.”<sup>1</sup>*

Recognizing that a tuition endowment requires many years to build – possibly 20 years or more – this three-year strategic plan envisions Spruce Street School taking the first steps toward building such an endowment.

<sup>1</sup> From Spruce Street School’s Core Values (**emphasis** added).



Preparing for Elders’ Tea

## Establish the building blocks necessary to launch a successful endowment campaign.

Tactic	Who is Responsible
Recruit board members to support the work of the Strategic Plan.	Governance Committee
Educate Board on its role in fundraising.	Governance Committee
Ensure administrative staffing is adequate.	Administration
Create an Endowment Committee.	Governance Committee Development Committee
Complete a fundraising resource assessment.	Endowment Committee
Prepare for feasibility study.	Endowment Committee
Conduct feasibility study.	Endowment Committee
Determine an endowment financial goal.	Board
Create campaign timeline.	Board

## Ensure Spruce Street is perceived as affordable and accessible.

Tactic	Who is Responsible
Define characteristics of students who fit well with Spruce Street School's mission and values in order to frame the discussion of affordability and accessibility.	Staff
Benchmark Spruce Street School against peer schools in terms of affordability and accessibility; include the total cost of one year of education (school fees + other costs and expectations).	Administration
Review parent material on financial aid, including how Spruce Street School promotes its financial aid program.	Communications Committee
Survey parents and former parents on the perceived value of Spruce Street School.	Communications Committee
Draft the value proposition for the school based on affordability and accessibility.	Communications Committee
Review and update parent educational materials on how Spruce Street School is funded and where money is spent.	Communications Committee



## Financial Strategic Goal

*“Manage the school’s resources in a way that balances the mission, core values and goals to ensure long-term financial stability.”*

*Rationale:* In order to launch and sustain a successful endowment campaign, we need to ensure our annual financial operations and long-term facility needs are addressed. We have a quality school building leased for another 20 years and are already setting aside reserves for a replacement facility. However, to fulfill our duty of fiscal responsibility, we need to maintain focus on providing reserves for that replacement facility while building a tuition endowment. In addition, ensuring a philanthropic culture helps us achieve our endowment goal, and helps us raise operating funds.



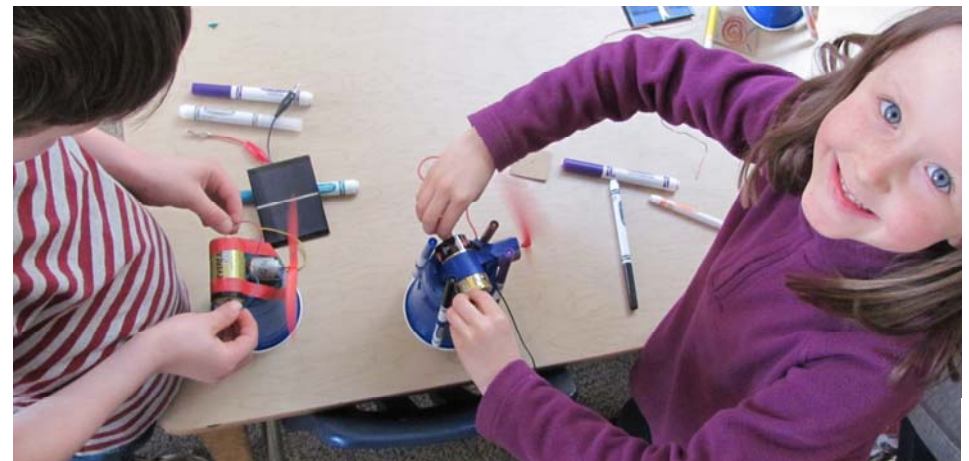
Studying electricity

**Facilities: Generate adequate reserves to ensure we can provide an optimal education facility for the long term.**

Tactic	Who is Responsible
Review and amend as needed the 10-year financial plan.	Finance Committee
Research real estate options to estimate costs.	Finance Committee
Conduct an Own or Lease Benefit Study.	Finance Committee
Review Investment and Finance Policies.	Finance Committee

**Philanthropy: Support efforts that foster connections and a greater culture of giving 2011-2014.**

Tactic	Who is Responsible
Educate Board on their role in fundraising.	Governance Committee
Create an annual calendar for fundraising and ensure calendar is widely available.	Development Director Development Committee
Analyze current fundraising efforts, community values, and historical trends.	Development Director Development Committee
Interview advancement officers from schools with successful annual giving programs to learn about activities that stimulate a culture of giving.	Development Director Development Committee
Based on analysis, use benchmarking to determine fundraising best practices and build future annual fund strategies.	Development Committee
Create a long-term development plan.	Development Director
Research motives of major donors at Spruce Street School, past and present.	Development Director
Define recognition guidelines for giving.	Governance and Development Committees



## Teacher Excellence Strategic Goal

*“Create an environment in which teacher excellence will thrive.”*

*Rationale:* We have excellent, well compensated teachers who are experts in their field. We rely on our teachers to deliver the highest quality program. The teachers truly deliver the mission and it is their work that not only inspires a lifelong love of learning, but also fuels our charitable giving. As we embark upon a financial aid endowment campaign, we want to ensure teaching excellence continues.



Reading with a teacher

## Teacher Excellence 2011-2014

Tactic	Who is Responsible
Define teaching excellence at Spruce Street School.	Teachers
Determine environmental factors that contribute to teaching excellence.	Administration Teachers
Conduct a survey of Spruce Street School teachers to identify indicators and ideas of what will best support their work.	Communications Committee
Use benchmarking with peer schools to analyze current salaries and benefits offered at Spruce Street School.	Communications Committee
Improve the professional development funding application process and allocation procedure.	Administration



Set building  
for spring plays



## Appendix A: April 21, 2010 Resolution

WHEREAS Spruce Street School, according to its mission, provides a nurturing educational community that instills in a broad range of children the social, emotional and intellectual skills for lifelong participation in a diverse society; and

WHEREAS diversity, including economic diversity, is a core value of Spruce Street School upholding this mission; and

WHEREAS economic diversity is only possible at Spruce Street School with a significant commitment to financial aid; and

WHEREAS presently financial aid is presently funded by the operations budget, and this level of aid is insufficient to guarantee the school's ability to meet the financial needs of currently enrolled students; and

WHEREAS a stronger commitment to financial aid will enable Spruce Street School to attract and accept students from a more economically and socially diverse range of households each year;

**NOW THEREFORE BE IT RESOLVED that the Spruce Street School Board of Trustees will build an endowment to sustain and provide long-term support for financial aid at Spruce Street School.**

"Diversity sets Spruce Street School apart, creates a learning dynamic and social environment that reflects our changing world and prepares our children to excel in it. Our North Star dances out in front, challenging us to go new distances to ensure that this element so fundamental to our school will grow as the school matures." *Jennifer Duncan, Board President*