STRATEGIC PLAN 2019-2022

Mulberry School inspires children to a life of learning and positive contribution to community. By weaving creativity and social learning into every day, we foster intellectual and social success for a lifetime.

Mulberry's Strategic Plan

Dear members of the Mulberry Community,

In 2014, Mulberry embarked on an approach to accreditation that brought together the established process of the Western Association of Schools & Colleges with the newly-developed process of the California Association of Independent Schools. The findings from those organizations are reflected and integrated with goals set forth by the board of trustees in the Strategic Plan. The new CAIS method aligns well with our approach to how our administration evaluates and monitors progress toward the goals our community develops. Our 2019-2022 Strategic Plan focuses on three key areas of development.

Acknowledging past accomplishments and continuing to develop Mulberry's offerings, our focus on **program cultivation** spans the restructuring of the preschool, greater cross-grade interaction (especially between preschool and elementary), as well as the establishment and expansion of the middle school. We are seeking to enrich the educational experience at Mulberry by allowing faculty greater collaboration time and space to establish an overarching curriculum trajectory that integrates efforts across all grades and through the entire student journey. Further, we are establishing processes to more effectively review this work while highlighting how our program promotes academic success.

Our focus on **financial sustainability** harnesses long-term planning and forecasting to map out milestones that will ensure Mulberry's continued growth for the next 50 years. Our team has developed a sound financial approach that is anchored in a five-year budget, a three-year enrollment plan, a 15-year site agreement, and a strategic development fund that will increase enrollment, expand programs, and support families through tuition assistance.

In the area of **institutional improvement** and leadership, we will grow our community to include more diverse students and families, staff and faculty, and board trustees. We will also expand our community by re-establishing ties with school alumni. We will continue to promote professional development of our employees through a review process that focuses on systematic goal setting and identifying opportunities for growth. Across all realms of the schools, we will make better use of data to inform key decisions about budgeting, financial development, enrollment, student progress, tuition, and financial aid.

There is certainly no lack of opportunities to do great work as we embark on this strategic plan. The goals set forth in this plan will require the effort and engagement of

all our community members. I invite all of you to join in this grand endeavor in all ways that you feel you can contribute.

We are so grateful to you for all that you do to bring the magic of Mulberry alive.

_____   _____   _____

Kara Riordan   Cheri Goodman   Timothy Dylan Wood
Head of School   Board Chair   Strategic Plan Chair

Strategic Goals

I. Program Cultivation
A. Promote academic programs in marketing materials [CAIS]

Leads: Director of Enrollment Management and Marketing Team

Statement of the Strategic Priority

CAIS Recommendation (Institutional Purpose and Core Values, Chapter 1): That the administration consider highlighting the school's successful fulfillment of its mission, particularly the strength of its academic programs, through the materials that describe and market the educational philosophy, curricular structure, instructional methods, and student profile (Self-study, pp. 81-82; conferences with Marketing/Operations Director).

Importance of the Goal

For Mulberry School to attract and serve students in accordance with its mission, families need a full picture of who we are and what we stand for. Although unique strengths in social-emotional learning and creativity distinguish our school, we are also true to another foundational premise of progressive education: strong academics. In a place and at a time when parents are increasingly concerned about their students' "success," it is particularly important to make clear how our philosophy, vision, and programs lead to strong academic achievement.

Impact on Student Learning

For students to benefit fully from Mulberry's innovative, research-based practices and programs, their families need to have confidence in the efficacy of those practices and programs. Clarifying our academic strength in messaging to our community will increase that confidence, which in turn will increase families' commitment to their students' learning, as well as furthering stability and continuity in the student body. Similar efforts in external marketing will attract families that are a fit for our educational philosophy and mission and, therefore, will further enhance our community.

Specific Implementation Steps

Effectively highlighting fulfillment of our mission will require a consistently funded marketing budget and a long-term marketing plan. With this support, the marketing team at Mulberry will:
1. Create branding that is more specific in highlighting programs available at Mulberry School, presenting an updated and accessible view of our program offerings
2. Create uniform, cohesive web content, pamphlets, flyers, and application materials that clearly advertise our mission statement
3. Collect student work for Open Houses and tours to showcase our academic program from preschool through middle school
4. Share alumni success as evidence that our progressive school model provides a solid foundation in preparing for life throughout and beyond a student's school years
5. Continue to showcase our teaching methods and outcomes through social media, blogging on specific topics, teacher newsletters, and parent education
6. Host a monthly coffee with our Head of School to discuss timely topics of interest for

current and potential families
7. Use a variety of visual, audio, and interactive media to highlight our mission, values, and educational philosophy and to demonstrate how our approach has contributed to the success of both current students and alumni.
8. Create a website that shows an accurate curriculum grid including 21st-century skills from preschool through middle school
9. Add event marketing, such as a speaker series for Mulberry School that promotes the benefits of a progressive education, including rejoining the Common Ground Speaker Series consortium. (Common Ground presents well-known education speakers whose messages often address the importance of "traditional" and progressive educational approaches for students' lives. Although the speakers are not discussing Mulberry per se, their emphasis dovetails with our philosophy and further supports the research underlying our academic strength.)

Projected Timeline
Ongoing.

Personnel Responsible
The steps to implement the branding and outreach plans fall squarely within the domains of the Director of Enrollment Management and the Marketing Team. These two key administrators will enlist additional support from the elementary and middle school curriculum specialists as well as the Preschool Director.

Resources Needed
Staffing and financial resources will be needed. The administration has already hired an agency to design and support new branding, collateral, and website. Additional funds and training will be required to add new social media avenues and to implement new programs as they are identified.

Assessing Progress
1. Progress will be tracked through Open Houses (attendees, packets delivered, applications, etc.), surveys, tours, online reviews, and website performance metrics.
2. Ultimate progress will be assessed in terms of increased student enrollment, with Marketing's goal being at least 80% of enrollment capacity in every class.
3. The relevant administrators will review and interpret all analytics and create benchmarks for success. These will address the following:
   a. A consistent funnel of families transitioning from preschool to elementary
   b. An increase in students transitioning from elementary to middle grades year over year
   c. An expanded number of external students recruited into middle school over the next three to five years
   d. Improved family retention year over year, with a goal of 95%

<u>Reporting Progress</u>
Progress will be reported through:
- Revised website
- Additional schoolwide emails/newsletters
- The weekly Mulberry *Buzz*
- Social media
- Blogging
- Word of mouth
- Additional videos

B. Create an ongoing program review and curriculum alignment that fosters faculty collaboration [CAIS]

Leads: Head of School and administration

Statement of the Strategic Priority

CAIS Recommendation (Teaching and Learning, Chapters 2-7): That the school create a manageable process of ongoing program review and curriculum alignment that provides space, time, and resources for collaboration between faculty in order to solidify best practices of teaching and learning, specifically including reviewing grade level assessments and the use of technology in the classroom (Self-study, pp. 94-95, 97, 104-107; conferences with Head, teachers).

Importance of the Goal

Collaboratively creating and implementing a curriculum that flows seamlessly throughout a student's years at Mulberry is essential. We must ensure a progression of understanding of concepts from grade to grade; minimize gaps and repetition; and develop a common understanding of curriculum among faculty, staff, parents, and students. Further, the curriculum must be reviewed regularly to ensure it keeps pace with evolving educational needs, best practices, and exciting new developments. Development of such a curriculum involves a high level of accountability for our team of teachers and requires dedicated time.

It is important that this review include aligning curriculum to student assessments because assessments not only track student growth but inform our teaching practices. The ways in which we track and celebrate student success include formative assessments, projects, presentations, goal-setting, creation of rubrics for self-assessments, and peer feedback. Finally, it is important that this collaborative process address classroom use of technology, ensuring that it enhances the overall program and curriculum in a deliberate way.

Impact on Student Learning

Students need a connected, cohesive, consistent curriculum that produces a seamless transition between the grades, optimizes the learning environment, and appropriately assesses learning so that adjustments may be made to support progress for each student. Such a curriculum is vital in supporting our student learning goals.

Specific Implementation Steps

Faculty will engage in ongoing and annually scheduled collaboration to review and revise our current curriculum scope and sequence as well as academic standards. We will examine where these align and where they require greater work to create clarity in how we are teaching and ensuring consistency from grade to grade. Teachers are already working to create and follow a set curriculum guide and assessment schedule to ensure connectivity in our teaching as well as optimal student learning. They will continue this collaboration, and the administration will work with the faculty to:

1. Implement a curriculum review plan, with progress tracked by grade-level leads
2. Schedule days for collaboration time specifically focusing on the plan
3. Provide clear pedagogical leadership that translates to logical progressions, philosophical alignment, and consistency in experiences across grade levels
4. Schedule grade-level collaboration times and log meeting minutes on SharePoint
5. Collect assessments in student cumulative folders
6. Ensure assessments are useful to teachers in adapting and planning instruction, as measured by teacher observations and interviews
7. Ensure the curriculum is centrally documented, on a three-year cadence, beginning in 2019
8. Ensure alignment between marketing and communication materials documented curriculum
9. Create program director positions focused on curriculum and evaluation

Projected Timeline
1. Every third faculty meeting is devoted to program teams (preschool, JK-2nd, 3rd-5th, and 6th-8th) for creating and preparing individual class scopes and sequences—ongoing.
2. Assessments and their alignment with the curriculum will be evaluated after the program and curricular goals are established. We dedicate two in-service meetings annually to ensure program/curriculum alignment—ongoing.
3. Individual curriculum standards (language arts, math, science, social studies) are evaluated each school year—ongoing.
4. Efficacy of schoolwide longitudinal MAP testing will be assessed in spring 2020.

Personnel Responsible
1. The Head of School, Assistant Head of School, Program Directors, Director of Communication plan the calendar to set aside dedicated staff meeting/collaboration/in-service time.
2. All teachers, the Head of School, Assistant Head of School, Program Directors, Director of Communication are present at in-service and collaboration times to ensure all voices are heard and perspectives considered.
3. Two teams have been formed at these meetings (drawing from faculty, the Head of School, grade-level program leads, and the Curriculum Coordinator): (1) Curriculum, Assessment, and Student Progress Reporting, and (2) Student Support Services.

Resources Needed
1. Collaboration time and resources for teachers to evaluate, revise, and develop teaching practices across the grade levels
2. Budget for professional development
3. Budget for piloting new programs and curriculum
4. Release time for two observation days/year for teachers to visit grade-level classrooms in other public and private schools
5. Budget for technology training for teachers

Assessing Progress

As this goal is achieved, the school expects to see that:

1. Grade-level collaboration times have clear goals and purpose; results/work products are communicated to division heads through an integrated system.
2. Assessments reflect benchmark expectations of each grade level, based on most-essential standards identified by teaching staff.
3. Assessments are multimodal and multivectoral, and seek to capture students' current places on their developmental trajectories.
4. Curriculum is articulated across grade levels: a set of experiences in one grade level can be mapped to a subsequent, logical experience in the next.
5. Curriculum is documented for each grade level/school division.

To maintain realization of this goal over time, the following metrics will be used:

1. Grade-level/division collaboration continues to be purposeful and useful for planning for student learning, as measured by teacher reflections. Continuous reflection and research on effective professional learning community structures are needed.
2. Teachers have latitude to customize their curriculum/program for students' needs and teachers' strengths; feel supported in finding resources; and are responsible for a self-identified, articulated core set of experiences for each grade level.
3. Assessments are collected in student cumulative folders.
4. Assessments are useful to teachers in adapting and planning instruction, as measured by teacher observations and interviews.
5. Curriculum is centrally documented and contains adopted curriculum/tools that are implemented/integrated with additional researched and approved curriculum.
6. Marketing/communications and enrollment management administrators are able to fully articulate curricular program features in meaningful ways to prospective families.

Reporting Progress

- Updated scope and sequence for each grade level are available to all Mulberry community members and posted on the school's website as of 2019.
- Articles will appear in the *Buzz*/Quarterly Newsletter and Annual Report celebrating and sharing the accomplishments of the staff and faculty through the collaborative time.

C. Design and promote a more vibrant, dynamic, and enriching preschool program [CAIS]

Lead: Preschool Director

Statement of the Strategic Priority

CAIS Recommendation (Teaching and Learning, Chapters 2-7): That the school capitalize on the upcoming extension of the preschool day to design and promote a more vibrant, dynamic, and enriching preschool program in greater alignment with the elementary grades (Self-study, pp. 128-139; Conference with Head, teachers; classroom observations).

Importance of the Goal

Mulberry seeks to offer preschool children an enriching experience that is full of enthusiasm and that both adapts to and stimulates change. Continuous improvement of the preschool program can also increase preschool enrollment, providing additional revenue for the school and creating the potential for expanded elementary enrollment. Greater alignment of the preschool with the elementary grades will offer the same benefits.

Impact on Student Learning

Learning at Mulberry Preschool will be enhanced by:
1. Better parent understanding of the development of their own children and others in the program (due to higher attendance at wrap-up sessions)
2. Stronger relationships within the learning community, which includes teachers, children, parents, staff, and possibly other family members
3. Increased trust of children in new adults and the school experience as well as the discovery of learning that is fun
4. Greater exposure to developmentally appropriate experiences focusing on creativity, large and fine motor development, and early academic concepts
5. More opportunities to revisit work and expand on previous experiences and learning
6. Scaffolding of learning within peer relations and open-ended projects
7. Greater variety of friendships due to the new flex schedule

Specific Implementation Steps

Mulberry's preschool program was completely redesigned and restructured for the 2015-16 school year. Continued fine-tuning is ongoing based on experience with the new program. Accomplishments to date under this strategic priority include the following:

Vibrant. The preschool has added more teachers, recruiting two from Google Children's Centers and Hidden Villa. It has also added days and created morning and afternoon slots with flexibility for families, because our research showed a huge increase in families with both parents working to allow them to live in the Bay Area. The preschool now offers a full-day option with an open menu, so families may pick which days they would like to attend. Further, current families have "emergency" drop-in options. Teacher-parent wrap-up sessions are now incorporated into the school day, which allows for higher attendance and greater parent

education. The preschool has thrived with a mixed-age student population. The classroom is cozier, with a more developed, complex environment; there is more life within it (fish tank, plants, etc.). The afternoon program offers time for rest as well as a small-group setting, which fosters deeper relationships and opportunities for an emergent curriculum.

Dynamic. The preschool conducts regular team meetings to reflect and make changes in the classroom, based on the needs of the children. We strive to change environments, working towards emergent curriculum, all the while thinking of family strengths and interests as "sparks." The expanded day and flex schedule offer more availability to new families. The preschool has begun an Early Childhood Education Task Force to align preschool, junior kindergarten, and kindergarten around developmentally appropriate practices. Preschool has optional opportunities for interaction with older elementary grades, with a very successful reading buddies program. The children are also participating in shared experiences with specialists for music and movement and gardening.

Enriching. The new preschool curriculum is meaningful and relevant, especially in having all parents conduct observations, which also inform curriculum planning and assessments. The preschool has participated in schoolwide community-building opportunities such as the Smile Campaign and one of our favorites, musician Nimo Patel's visit. We are so proud that Mulberry Preschool has cultivated persistence, self-help, and self-regulation among its students. We have also added technology and photo and video documentation. This allows parents to see and share with their children after hours what they experienced at school.

Projected Timeline
The new preschool program design was launched in the 2015-16 school year. There is ongoing review and constant reevaluation at monthly team meetings. For the 2016-17 school year, the preschool added home visits, welcoming conferences, additional parent education, and team building for parents based on their work day. Implementation of these and the other strategies listed below under Assessing Progress is ongoing.

Personnel Responsible
Director of Preschool and preschool education team

Resources Needed
1. Time for meetings: more in-service days that align with those of the elementary school
2. Participation in meetings: inclusion of aides in team meetings
3. Consistent staffing

Assessing Progress
The new approach has proven exceptionally successful in meeting the needs of children and their families, as evidenced by active engagement of preschool attendees and faculty as well as a waiting list for admission. To guarantee the continued success of this program, the Preschool Director will continue the following strategies for promoting the preschool and measuring its progress:

1. Conduct in-class observations and documentation
2. Disseminate weekly emails to families
3. Hold team meetings that incorporate a reflective process
4. Incorporate more opportunities for cross-over with the elementary grades (e.g., attending school plays, meeting with fifth-grade reading buddies once a week, having library time in the elementary library, participating in the middle school community service opportunity, participating in Fun Run)
5. Offer teacher home visits at the beginning of the school year to new families
6. Monitor the new, more flexible schedule
7. Promote flexible parent participation to meet the needs of families and to be more in line with our elementary school
8. Have teachers make daily observations and take notes of children's progress throughout the year
9. Remain true to play-based learning while differentiating between the older and younger preschoolers
10. Formalize parent/teacher conferences. Each student gets an individualized digital portfolio that includes gifts, areas of growth, and goals.
11. Offer an optional second parent/teacher conference at the end of the school year
12. Ensure each classroom has two teachers and each family or family group has a point teacher
13. Hold staff meetings every week to collaborate as a team
14. Ensure teachers listen to students' interest and develop curriculum around that
15. Track progress in biweekly meetings with Head of School or Program Coordinator
16. Assess progress in annual performance review of the Preschool Director

Reporting Progress
- Weekly emails to preschool families and schoolwide Mulberry *Buzz*
- Social media via Director of Communication

D. Provide more cross-over opportunities between preschool, elementary, and middle school
Leads: Administration, program directors, and PAC

Statement of the Strategic Priority
Increase opportunities for preschoolers and elementary students, as well as elementary and middle school students, to learn with and from one another and to build community together.

Importance of the Goal
Promoting preschool–elementary and elementary–middle school cross-over opportunities encourages greater and more natural retention of students across grades. It also promotes a shared sense of community by fostering more familiarity between families from various classes.

Impact on Student Learning
Engagement of students across grades provides educational opportunities beyond those available in a single-age grouping. It also increases the excitement of younger students about what they will be able to learn in future grades.

Specific Implementation Steps
Program directors and PAC will foster cross-over opportunities such as:
1. Encouraging middle school students to take leadership roles in coordinating school community events and hosting Friday Sing
2. Building buddy time opportunities into the curricular schedule
3. Educating parents on the whole-school approach to learning and curricular through-lines
4. Combining year-level field trips
5. Including year-above teacher visits to class meetings in February/March to disseminate information and answer parent questions
6. Promoting fifth-grade shadows in middle school until those fifth-graders are in middle school
7. Establishing Buddy Day/Buddy Afternoon programs
8. Holding whole-school parent meetings two to three times per year on topics that span wide age ranges

Projected Timeline
Ongoing

Personnel Responsible
Preschool Director and program directors, working with PAC

Resources Needed
School-provided schedule flexibility and allocation of time to allow cross-over opportunities

Assessing Progress

The success of these efforts will be evidenced by:

1. Increased student retention between Preschool and JK, JK and K, and fifth and middle school
2. Increased attendance of families from all areas of the school at schoolwide events
3. More purposeful and timely communication with the school community
4. Descriptions of PAC officer and classroom rep roles that clearly articulate crossover responsibilities
5. PAC participation at the preschool level

Reporting Progress

- Upcoming and accomplished cross-over gatherings will be promoted in the Mulberry *Buzz* and at schoolwide meetings.
- Preschool and program directors will report progress quarterly to the Head of School.

E. Enhance the middle school for grades 6 through 8
Lead: Middle school faculty and Head of School

Statement of the Strategic Priority
Create a flourishing middle school that attracts both Mulberry fifth-grade families and families from other elementary schools, and prepares the students well for high school.

Importance of the Goal
The middle school allows Mulberry to provide an educational opportunity for families looking for a K-8 school. It also creates an attractive option for families who are looking to transfer in school during mid-elementary years and would like continuity for several years. It extends a stable educational community throughout important transitional years, and it is consistent with research that indicates additional benefits of staying at one school for more consecutive years.

Impact on Student Learning
A middle school extends Mulberry's unique, research-based academic program to older students. It also enables more integrated curriculum across the older grades. In terms of student lifelong learning, an enhanced middle school prepares students for success at the high school level and beyond.

Specific Implementation Steps
Building on existing efforts, the middle school team will:
1. Document written curriculum and sources
2. Develop a rigorous academic and social-emotional learning program
3. Appoint a middle school director
4. Establish hiring protocols for middle school staff
5. Conduct annual program reviews in light of current research on progressive middle school learning
6. Modify spaces/classrooms to enhance middle school learning as appropriate to enrollment increases
7. Establish a parent education program specific to middle school
8. Develop a leadership program for students

Projected Timeline
1. Mulberry initiated a middle school for sixth and seventh grades in the 2016-17 school year and added eighth grade in 2017-18. The first eighth-graders graduated in 2018.
2. The school intends to grow enrollment to support a full-time Middle School Program Director by 2021-22.
3. Building on existing efforts (above) is ongoing.

Personnel Responsible
Head of School and middle school faculty

Resources Needed

Additional faculty and classroom space will be needed as the program expands.

Assessing Progress

The measures of success in this goal are:
1. Strong enrollment numbers in middle school programs
2. High parent and community confidence in continuation of the program
3. Retention of elementary students into middle school
4. Adherence to established staffing numbers and hiring protocols
5. Establishment of a review process for programs and staffing
6. Expansion of learning spaces to fit higher enrollment
7. Acceptance of graduating students to high schools of choice

Reporting Progress
- Celebrate achievements in graduation ceremonies and end-of-year student-led portfolio exhibitions
- Report high school acceptance data in Open House materials, at schoolwide meetings, on the website, and in the Annual Report

II. Financial Sustainability
A. Engage in long-term financial planning and forecasting, including a detailed five-year budget projection [CAIS]
Lead: Finance Committee

Statement of the Strategic Priority
CAIS Recommendation (Financial Sustainability, Chapters 8-10): That the Board of Trustees, Head of School, and Administration embark on a process of long-term financial planning and forecasting (including a detailed five year budget projection) to address strategic issues related to institutional sustainability: enrollment, facility lease costs, staffing needs, program growth, faculty and staff compensation and benefits, tuition assistance, and fundraising (Self-study, pp. 149, 205, and 215-216; conferences with board, administration; Strategic Plan: 2014-2017, pp. 7-12).

Importance of the Goal
Long-term financial planning and forecasting is crucial for Mulberry. It provides insight into future financial capacity so that strategies can be developed to achieve long-term sustainability. A tuition plan provides predictability for Mulberry School and families engaged in their own budgeting. In addition, this type of planning stimulates discussion and engenders a long-range perspective. Financial planning can avert financial challenges, encourage long-term and strategic thinking, and develop consensus on long-term financial directions.

Impact on Student Learning
Sound financial planning promotes continuous and consistent student experiences. It also ensures an enduring institution in which students will thrive and families will re-enroll.

Specific Implementation Steps
The finance team will:
1. Complete a five-year plan that addresses strategic issues relating to enrollment, program, and facilities growth wherein expenses such as facility leasing costs, staffing needs, staff compensation and benefits, and tuition assistance are in line with overall income
2. Tailor financial planning so that the school maintains six months of operating expenses in reserves by year 2
3. Create an endowment by year 10 equal to at least .5% of Mulberry's operating budget (through transferring 1/3 of all campaign, annual giving, and special events net revenue and 1%-3% of annual operating surplus to endowment)
4. Establish a plan for consistent and predictable tuition

Projected Timeline
Initial completion of the five-year budget was achieved at the end of the 2018-19 school year. The five-year budget will be a continual working document, incorporating ongoing insight and information from staff and faculty and including periodic updates when necessary.

<u>Personnel Responsible</u>
The following are responsible for providing information to the Finance Committee in the areas specified:
1. Enrollment strategies and projections—Director of Enrollment Management and Marketing Team
2. Facility lease cost projections—Director of Finance and Facilities Committee
3. Staffing needs—Head of School, Director of Finance, and Curriculum Specialist
4. Program growth and after-school enrichment—Head of School and Curriculum Specialist
5. Faculty and staff compensation and benefits—Head of School, Director of Finance (using data from CAIS, Cal-ISBOA, Glass Door, Indeed, salary.com)
6. Fundraising—Development Committee and Director of Advancement

The Finance Committee is responsible for developing information on tuition assistance funding and for coordinating all other information provided.

<u>Resources Needed</u>
Achieving these goals is contingent upon:
1. Successful enrollment and marketing plan (increased enrollment and tuition dollars)
2. Successful campaign and other efforts yielding annual revenue of $3,000,000 above normal operating income
3. Lease renegotiation resulting in no more than a 25% increase in rent for 2020/21, then no higher than 6% annually

<u>Assessing Progress</u>
Annually, the Finance Committee will review the strategic and five-year plans to make sure they are still in alignment with the school's growth, specifically monitoring and reporting to the board:
1. Market position and price (Are we seeing a softening of demand, attrition with tuition increases?)
2. Affordability (Can the top 15% of family incomes in Santa Clara County afford to enroll at least one child at full tuition?)
3. Tuition dependency (Should tuition continue to pay for operating costs beyond the duration of the five-year plan, or do we look to diversify or find other significant streams of revenue?)
4. Staff salaries (Are they comparable to Cal-ISBOA, CAIS, and regional public school ranges?)
5. Program and staffing (With continued growth and attrition, are they still the right size for our school?)
6. Class size
7. Facilities, equipment, and technology
8. Giving (Is there capacity to expand?)
9. Reserves/endowment growth (Should we adopt policies on giving and budgeting that would contribute annually to the growth of reserves and the budget)
10. Actual enrollment (Is it in line with the enrollment projections in the three-year

enrollment plan [goal II.B below]?)

Reporting Progress

To report progress to staff, families, and the community at large, Mulberry's budget—its revenues and expenditures, including how resources are allocated—will appear on the school's website. In addition, the budget and financial progress are shared at the annual State of the School meeting.

B. Develop three-year enrollment plan that includes 6th, 7th, and 8th grade expansion

Leads: Director of Enrollment Management, Head of School, Director of Finance, Middle School Program Director

Statement of the Strategic Priority
Develop a plan to achieve full enrollment (16-17 students) in every elementary classroom and 18 middle school students, and maintain low attrition.

Importance of the Goal
Enrollment is a principal revenue source that ensures the continuance of the school. This plan aligns with the five-year financial plan to ensure financial sustainability and enhancement of programs.

Impact on Student Learning
The targeted full enrollment serves the best learning environment, per teacher feedback. A consistent cohort and size reinforces expectations and capabilities of the educational experience. This provides more engaging classroom dynamics and increased resources for program enrichment.

Specific Implementation Steps
Complete a three-year plan that accomplishes the following:
1. Maintains consistent tuition increases, making sure they continually correlate with market position and price
2. Aligns school tour information with what's happening in the programs
3. Establishes lead role for program directors in school tours and decision making on potential enrollees for their grade levels
4. Creates wide positive community knowledge of the Mulberry program and offerings

Projected Timeline
Initial plan completed with five-year plan in June 2019
Annual updates to be presented to board at annual workshop

Personnel Responsible
Director of Enrollment Management

Resources Needed
Time for director to track, analyze, and report on specific data points (listed below)
Access to relevant data from comparable schools and county demographics

Assessing Progress
The measures of success in initial achievement of this goal are:
1. Enrollment that continues to grow, equaling or exceeding the projections in the three-

year enrollment plan
2. Existence of a waitlist
3. Low attrition (below 5%), especially from fifth to sixth grade
4. View of staff, parents, and teachers that the program is in continual alignment with their expectations
5. Determination that the top 15% of family incomes in Santa Clara County can still afford to enroll at least one child at full tuition

Continued success in achieving this goal will be assessed by ongoing review of the plan to ensure it is in alignment with the school's growth, specifically monitoring:
1. Market position and price (Are we seeing a softening of demand, attrition with tuition increases?)
2. Affordability (Can the top 15% of family incomes in Santa Clara County afford to enroll at least one child at full tuition?)
3. The enrollment process (Is it still working; are additional processes needed?)
4. Accurate reflection of programs in the enrollment process (to be evaluated twice per year)
5. Communication of program content across the school—e.g., preschool families understand elementary and middle school programs

Reporting Progress
Enrollment actuals reviewed at every board meeting
Annual report at the board workshop

C. Develop plan for school site and lease renewal
Lead: Site Task Force

Statement of the Strategic Priority

The Site Task Force will ensure that Mulberry School has a determined site and plan with the following specifics:

1. An "affordable" 15 + year lease starting in 2020
2. A 15-year facilities plan that focuses on investment in the facility and expansion to match the planned growth of enrollment and student offerings over the 15-year time period
3. Appropriate development expanding the use of the space (e.g., a STEAM design lab/media center that could be leased out to the community on weekends as well; an enhanced middle school; enhanced garden, kitchen, and performing arts areas)

Importance of the Goal

The goal has three objectives:

1. Maintain the current feeling and culture of a neighborhood school for students, parents, and Mulberry employees
2. Maintain a lease cost that is economically viable for the long-term health of Mulberry with tuition at the levels established in the five-year financial plan (goal II.A above).
3. Continue to update and expand the facility to keep current with our offerings to students, support teachers, and encourage new families to join our community

Impact on Student Learning

Mulberry's culture is that of a neighborhood school with an open, friendly community. This feeling is integral to our overall teaching philosophy and methods, and it is well supported by our current site. Long-term facility improvement and expansion support our ability to maintain our academic and social programs for our students.

Specific Implementation Steps

The task force will achieve these aims by doing the following:

1. Engage in successful negotiations with Union School District to obtain:
   a. A 15-year lease with a 15-year option to extend
   b. lease rate no more than 25% higher than the current rate
   c. Yearly cost-of-living increases of no more than 6%
   d. Mulberry control over the sublease rates
2. Engage in successful negotiations with Bright Horizons to obtain:
   a. A series of three leases of five years each
   b. An option for Bright Horizons to extend, while giving Mulberry a two-year window to plan for expansion of our core school
   c. A lease rate at least 5% above Mulberry lease costs
   d. Cost-of-living increases matching those under the Union School District core lease

  e. Continuation of current lease structure regarding Bright Horizons responsibilities for maintenance and improvements
3. Develop a three-year rolling facility maintenance, improvement, and expansion plan that:
  a. Has broad input from employees and parents
  b. Is published and understood by employees and parents
  c. Can be supported by the five-year financial plan
  d. Supports Mulberry's fundraising efforts with details and facts

Projected Timeline

1. Complete lease with Union School District by November 1, 2019 (done)
2. Complete lease with Bright Horizons by November 15, 2019
3. Submit three-year rolling facility plan to the board for review by February 1, 2020
4. Submit final three-year rolling facility plan to the board by March 1, 2020

Personnel Responsible

Head of School, Facilities Manager, Site Task Force

Resources Needed

1. Board of trustees teamwork
2. Historic information from Facilities Manager
3. Financial information from the Finance Committee
4. Funds from the operating budget and fundraising

Assessing Progress

We meet or beat the timeline and performance targets listed above.

Reporting Progress

- Quarterly updates to board of trustees
- Semiannual updates to employees and parents
- Quarterly updates to those responsible for fundraising

D. Explore new sources of revenue, including $1.25 million strategic development campaign

Leads: Director of Advancement, Strategic Development Committee

Statement of Strategic Priority

Take steps to broaden Mulberry's sources of revenue. Most importantly, launch a five-year strategic development campaign to raise $1.25 million to increase enrollment, expand programs, and support families through tuition assistance. The purpose of the campaign is to grow Mulberry to a level that allows us to thrive financially and enrich our programs and community even as we deal with higher facility leasing costs beginning in 2020.

Importance of the Goal

A more extensive revenue base will enable continuation, growth, and further enrichment of the Mulberry program. It will also increase resilience in case of economic volatility and changing demographics, ensuring that we continue to fulfill our mission well into the future.

Impact on Student Learning

All students will benefit from the expanded middle school program, new design lab and media center, and enriched gardening and cooking programs. Tuition assistance will make Mulberry accessible to a wider range of students, which will enhance learning for all students.

Specific Implementation Steps:
1. Hire a consultant
2. Create Strategic Development Committee
3. Purchase donor tracking software
4. Develop a case document
5. Complete a feasibility study
6. Identify and document potential donors
7. Receive board approval
8. Train board members for the ask
9. Develop a timeline to meet with potential donors
10. Hold ongoing meetings with targeted donors
11. Develop a process for donation tracking, thanking, and follow-up
12. Maintain ongoing relationship with donors
13. Research, select. and apply for outside grants

Projected Timeline

Meet recommended target of donation commitments during the quiet period
Meet target of 100% of total by end of campaign.
Select and apply for outside grants.

Personnel Responsible
Director of Advancement
Strategic Development Committee
Board of Trustees

Resources Needed
Campaign budget
Internal and external campaign co-chairs
Additional volunteer campaign and grant workers in support of Director of Advancement

Assessing Progress
Metrics for achievement of this goal will be:
1. Meeting of goals for the Strategic Development Campaign
2. Improved cash flow
3. Increased strategic reserves
4. Retention of current families receiving tuition assistance as a result of tuition increases during campaign timeline
5. Successful awarding of grants

Reporting Progress
Annual Report
Periodic updates to the board
Periodic reports through the school's communication processes
Periodic update of grant status in monthly board reports

III. Institutional Improvement
A. Hire from the broadest possible pool of qualified applicants from diverse backgrounds [CAIS]
Lead: Head of School

Statement of the Strategic Priority

CAIS Recommendation (Operations, Chapters 11-13): That the Head of School and Administration design a hiring process that prioritizes attracting the broadest possible pool of qualified applicants from diverse backgrounds (Self-study, p. 165; conferences with Head of School, administration).

Importance of the Goal

Establishing a hiring process inclusive of the broadest possible pool of qualified applicants has a direct positive impact on our students, on student learning, and on our classroom and school community. It has become clear through the self-study that this is an important strategic priority. Qualified teachers and staff members are the foundation and heartbeat of our Mulberry community. Their professional expertise and ability to fulfill their specific role, while contributing to the greater schoolwide strategic goals, are what support the ability of each of our students to reach their individual learning potential. Ensuring that our team includes educators and administrators from diverse backgrounds enriches our community in multiple ways, including having staff that share backgrounds with students.

Impact on Student Learning

A diverse faculty and staff will enrich student learning by ensuring that our program incorporates a wide range of cultural perspectives. Teachers will be better able to seamlessly integrate multiple perspectives and cultural learning into classroom discussions in contexts such as history, social studies, environmental justice, and social justice. This will be particularly important as we move into our Global Citizenship curriculum. Further, having faculty and staff from diverse backgrounds will deepen Mulberry's ability to provide social and emotional support for students of all backgrounds.

Specific Implementation Steps
1. Form Diversity Focus Group, including a hiring subgroup created with oversight from Human Resources
2. Identify best practices in hiring for diversity
3. Draft a screening process for a variety of jobs—résumés, credentials, references, interviews—including how many and which individuals participate in hiring, designated interview questions and focus topics, incorporation of interaction of candidates with students and parents, and observations
4. Ensure that diversity statements are meaningfully represented in job descriptions and when candidates come to tour the school
5. Utilize hiring firms such as EdJoin, Craigslist, and (as financially feasible) CalWest, as well as networking with CAIS heads and diversity listservs

6. Implement hiring practices that include advertising for job postings through NAIS People of Color, Teaching Tolerance, and Facing History and Ourselves Cohorts
7. Ensure Mulberry is prepared to welcome diversity in students, faculty, and staff

Projected Timeline

The Diversity Focus Group will be formed and conduct its activities in the 2019-2020 academic year. The hiring process will be drafted during spring 2020. Use of the process and hiring sources specified will be ongoing.

Personnel Responsible

The Head of School and board of trustees will initiate the Diversity Focus Group and solicit supportive individuals from within and outside the Mulberry community. The Head of School and Human Resources leads (within the board and administration) will review the school's hiring process and implement changes that support greater diversity. Faculty and staff will conduct interviews and observations of candidates. The Diversity Task Force will identify and prioritize areas for growth.

Resources Needed

1. Funds to advertise for applicants through a broader pool of agencies
2. Funds to support competitive salary/benefit packages
3. Committed individuals to lead the Diversity Focus Group as well as trustee and administration support to collaborate
4. Funds to attend diversity trainings such as NAIS and CAIS annual conferences and CalWest trainings
5. Forum for leadership, faculty, and staff to confront biases and grow

Assessing Progress

Progress to date:
1. A new screening approach has already attracted a broader group of candidates and led to great new hires, including two qualified, highly culturally competent division heads in the lower elementary and middle school.
2. The school added language valorizing diversity in job descriptions; it also added interview questions relating to prior experiences or commitments to diversity in education, and as a diversity practitioner.
3. Staff attended Cultural Competency by Design training.

Next steps:
1. Compare and contrast demographics of Mulberry School with those of other CAIS schools in Northern California, in a 25-mile radius, and in the greater CAIS and NAIS areas.
2. Utilize staff surveys from the CAIS Self-Study and compare to 2017 results to quantify cultural and socioeconomic diversity among staff. Use the pre- and post-survey comparison and reflections on this as a part of parent education and cultural literacy trainings, specifically in regards to assessing the positive integration of diverse faculty.
3. Gather qualitative feedback from new families and staff on their transition to our

community in order to learn and inform insights on the school's progress in growing diversity.

4. Conduct research with other independent schools that have significantly increased diversity in staff and faculty composition.

5. Evaluate whether the leadership team is composed of qualified, culturally competent individuals who maintain a culture of growth, learning, open-mindedness, and ability to take criticism and engage in "difficult" conversations.

6. Assess progress on our vision for success: Faculty and staff diversity increased, with an optimal goal of greater than 50% self-identified persons of color (from 24% currently); diversity of core leadership team increased, with an optimal goal of at least 50% persons of color; qualified person of color with extensive cultural competence added to marketing/communications leadership team; cultural competency and sensitivity training completed for all staff and faculty.

Reporting Progress

- The school's Annual Report will include ethnic, cultural, gender, and socioeconomic demographics.

B. Enhance the systematic goal-setting and professional evaluation process for administrators and teachers [CAIS]

Lead: Leadership Committee

Statement of the Strategic Priority

CAIS Recommendation (Institutional Stewardship and Leadership, Chapters 14-15): That the Head of School, board, and administration secure the time and resources to enhance the systematic goal-setting and professional evaluation process for administrators and teachers, supplemented by targeted professional development (Self-study, pp. 103-104, 107-108, 205, and 226; conferences with Head of School, administration).

Importance of the Goal

Goal-setting, professional evaluation, and professional development all enhance the overall performance and efficiency of Mulberry School's employees. Additional time for teachers and staff to meet/collaborate gives them the uninterrupted opportunities needed to develop measurable goals and create plans to achieve them. The time allotted for in-service days has been studied and determined to be in sync with that at other schools in the Bay Area, both independent and public.

Impact on Student Learning

Students benefit from this extra in-service time. The staff and faculty are able to plan cross-grade experiences and ensure that the material taught in each grade flows seamlessly to the next as children progress through their years of Mulberry education. In addition, when faculty and staff pursue professional development opportunities, they bring new energy and new ideas into the classroom. Finally, regular evaluation ensures that all teachers and staff are engaged in a process of self-reflection that enhances student experience.

Specific Implementation Steps

1. The Strategic Plan guides the work to be done and who is responsible for doing it. The board periodically reviews the Strategic Plan throughout the year and adjusts it to reflect changes in the work or decisions.
2. Additional strategic planning time for the staff and faculty leadership team is scheduled prior to the start of the school year—several additional in-service days to calendar and prioritize work for the year.
3. Team goals will be identified during the in-service days, and planning to meet these goals will be documented and systematically enacted.
4. Regular in-service days are currently held monthly so that all staff and faculty can meet, plan, and work with professional development experts as appropriate.
5. Each administrator and teacher:
   a. Sets annual goals and completes an annual performance evaluation
   b. Receives feedback on the performance evaluation and goals; this includes a write-up and a follow-up meeting

      c. Is subject to a three-year observation cycle: each year two-thirds of the team receives casual observation and one-third receives a more comprehensive evaluation, including classroom observation

      d. Collaborates on updating the organizational chart

6. Policies will be put in place and periodically reviewed to ensure the goal-setting and evaluation process is performed consistently each year.
7. The school uses information available from CAIS, NAIS, and other professional independent educational organizations to benchmark its performance evaluation processes.
8. Employees receive professional development opportunities in their observation year, and in other years as resources allow.
9. Administrators provide appropriate training/mentorship for each observation-year employee, and for others as resources allow.

Projected Timeline
1. The frequency of in-service days increased beginning with the 2015-16 school year.
2. The board of trustees reviews the Strategic Plan quarterly.
3. The Head of School:
      a. Completes goals for the new school year in June/July
      b. Presents goals to the board of trustees in August
      c. Checks in on goals with the Leadership Committee in January
      d. Receives Performance and Compensation Evaluation review in May/June

Personnel Responsible
1. The Head of School is responsible for approving the work that happens during the in-service days.
2. The Head of School and the Director of Finance have begun a review and update of the performance evaluation processes and documentation.
3. The Board Chair and Leadership Committee update the performance evaluation process for the Head of School.

Resources Needed
1. Funding:
      a. To expand professional development for staff and faculty
      b. Potentially to add leadership role (e.g., part- or full-time curriculum and supervision director, elementary school director)
      c. To assist with professional development/goal-setting/reflection and a supervision component
2. Performance evaluation data from comparable schools to ensure Mulberry's performance evaluation processes effectively reflect the individual performance and goals of staff, faculty, and administration

Assessing Progress
The responsible personnel report at least quarterly on their progress. The success of allotting

additional in-service time to administration, faculty, and staff can be tracked as new programs are put into place within the individual areas. Annual performance reviews will be tracked in individual employee files.

Success is achieved when the administration, teachers, Head of School, and board are working toward the same vision for the school. The goals of the administration and teachers roll up into the goals of the Head of School, which roll up to the annual goals the board sets for itself each summer. Teachers understand the model and are informed of the goals of the Head of School and the board at the start of each school year. Administrators and teachers consistently set annual goals and receive feedback on progress toward those goals, receive annual performance and compensation evaluations, and take advantage of professional development opportunities to assist in achieving the goals and enhancing performance.

Reporting Progress
- The Strategic Plan goals are discussed and progress on them is reported to the Mulberry community during the State of the School meeting held annually as well as through Mulberry's Annual Report. The State of the School meeting also typically includes financial reporting and other reports from the administration and faculty.
- The Head of School, staff, and faculty report their progress via monthly board reports and weekly notes to the community. The Head of School's monthly reporting will include changes to the process by which Mulberry conducts performance evaluations.
- All staff, faculty, and administrators will receive communications regarding changes to the performance evaluation process prior to the new evaluation period.
- Mulberry's weekly e-newsletter informs the community at large of schoolwide happenings.

C. Identify board skills needed and recruit to needs, train, conduct self-evaluations, document processes and record keeping
Lead: Governance Committee

Statement of the Strategic Priority
Governance knows exactly what skills are lacking on the board and is able to recruit for those skills. New trustees go through the nomination process as outlined in the Nomination Workflow chart. They receive training and a training manual within 30 days of their start date. They understand the roles and responsibilities of a trustee and sign confidentiality and conflict of interest statements, as well as a service agreement, upon joining the board and annually thereafter. They have access to documents and policies stored electronically. At the end of each school year, they complete an evaluation of themselves and the board.

Importance of the Goal
For the board to accomplish its responsibilities of furthering Mulberry School's mission, ensuring its continued financial viability, engaging in strategic planning, and supporting the Head of School, it requires trustees who:
1. have a range of specific skills and competencies,
2. have received thorough and consistent training in board roles and responsibilities, and
3. have access to the information they need to make appropriate decisions.

For the board to ensure its processes are functioning well, trustees need to periodically evaluate those processes

Impact on Student Learning
Mulberry's mission is all about student learning. Board decisions advancing that mission therefore enhance student learning. The board's fulfillment of its responsibilities in financial viability, strategic planning, and support for the Head of School also help create a stable, highly functional school environment for all members of the Mulberry community.

Specific Implementation Steps
1. Reassess board needs quarterly, adhere to recruiting workflow, and conduct consistent new-member training
2. Focus on recruiting individuals whose skills grow the capacity of the board
3. Maintain a running list of candidates who could fill upcoming openings. Establish reliable mechanisms for identifying candidates (e.g., Board Match, OnBoard, parents, alumni).
4. Make the end-of-year board evaluation a tool for making any needed changes to the workings of the board
5. Ensure all trustees are always in recruiting mode and fully cognizant of the skills needed for the board to flourish

Projected Timeline
Ongoing

<u>Personnel Responsible</u>
Governance Committee

<u>Resources Needed</u>
Governance Committee members
Funding and support for events such Board Match and OnBoard

<u>Assessing Progress</u>
The presence of engaged trustees working collaboratively with other trustees and the Head of School as well as making forward strides on board initiatives signals achievement of this goal.

Specifically, progress is shown by:
1. Documentation of quarterly reevaluation of skills required on the board
2. Maintenance of running list of potential new trustees
3. Changes made based on input from the annual board evaluations
4. Up-to-date electronic storage of documents and policies
5. Regular review and updating of bylaws, processes, and policies

<u>Reporting Progress</u>
Announce new board members in Mulberry *Buzz* and on school website

D. Better utilize data in informing all facets of the school [CAIS]
Leads: Director of Enrollment Management, Director of Advancement, Director of Student Support, Marketing Committee, and Finance Committee

Statement of the Strategic Priority
CAIS Recommendation (Institutional Improvement and Sustainability, Chapter 16): That the Head of School, board of trustees, and administration develop an overarching approach and orientation to better utilize data in informing all facets of the school, including: admissions, attrition, compensation, fundraising, instruction, programs, student assessment, tuition, and tuition assistance (Self-study, pp. 110-111, 206-213; conferences with Head, board, teachers).

Importance of the Goal
Data allow Mulberry School to make the informed decisions needed to create a successful business model and to fulfill our mission as an educational institution.

Impact on Student Learning
Appropriate use of data enables improvement of all aspects of the learning environment. It also makes it possible to provide better information to our community. This further supports student learning, given Mulberry's unique emphasis on community in all facets of its program.

Specific Implementation Steps
1. Develop a best-practice Key Function Indicator (KFI) model.
    a. Build a KFI reporting matrix that includes the following:
        i. What is being reported
        ii. How we are measuring the data
        iii. Whom the reports go to
        iv. The reporting schedule (e.g., monthly, quarterly, annual)
    b. The KFI reporting matrix should be updated and published each year by the Head of School and presented to the board and all Mulberry staff. The goal is to make everyone aware of what we are tracking, why, and how it is used, and to create an opportunity for discussion and changes to the matrix over time.
    c. KFIs should be used to:
        i. Obtain feedback on how our school is performing
        ii. Generate ideas on how we can improve
        iii. Demonstrate to parents the value of Mulberry
        iv. Provide prospective parents with tangible measurements of the value of Mulberry

2. Task the Director of Enrollment Management (DoE) to develop a set of KFIs to graphically track over time key indicators such as:
    a. Enrollment overall and by grade
    b. Retention overall and by grade
    c. Open House conversion rates

    d. Tour conversion rates

    e. Other measures of enrollment performance as appropriate

    f. Benchmark data from NAIS and CAIS

    g. Other information gathered from parents, prospective parents, and students (see #6 below)

3. Once the Director of Enrollment Management has refined their department-specific KFIs, hold a one-hour training session with the Mulberry leadership team with the following goals:

    a. Share the DoE "KFI best practice" with the team with the goal of department leaders developing and using KFIs in their areas of responsibility

    b. Review how the DoE KFIs were developed

    c. Review how the DoE reporting formats were developed

    d. Discuss how the DoE reports can be used

4. Task the Finance Team to develop a set of KFIs to graphically track key indicators over time.

    a. These indicators should include:

        i. Budget vs. actual cash, revenue, and expenses

        ii. Direct expense per student

        iii. Overhead cost per student

        iv. Fixed cost vs. variable costs

        v. Mulberry team compensation, comparing with local, CAIS, and NAIS data

        vi. Mulberry tuition, comparing with competitor schools, CAIS, and NAIS data

        vii. Tuition assistance (staff and nonstaff), comparing with competitor schools, CAIS, and NAIS data

    b. The CFO should also work with Mulberry leadership to determine and track the following as KFIs:

        i. Acquisition cost of a student

        ii. Lifetime economic value to Mulberry of a student

5. Task the Director of Advancement to develop a set of KFIs to graphically track key indicators over time, overlaying comparable CAIS and NAIS information where relevant. Key indicators should include:

    a. Grant writing (applied vs. granted)

    b. Fundraising by source

    c. Event return on investment

    d. Nontuition funds by type over time

6. Task the Director of Enrollment Management (or his/her designee) to do the following:

    a. Once a year:

      i. Ask a fixed percentage of parents in each class to list three items they love about Mulberry and three items they would like to see altered or improved. This should be done in the same calendar week each year.

     ii. Develop a report with logical groupings of responses for the current year and comparisons with previous years.

b. Implement student assessment surveys with metrics that can be used to evaluate overall school perception and focus on student retention. Once the survey is created, set up consistent year-to-year data points to establish KFIs.

c. Develop a standard phone script and call every parent who contacts Mulberry but later selects another school to capture:

      i. How they heard about Mulberry

     ii. What type of interaction they had with Mulberry (tour, shadow, phone)

    iii. Why they chose another school

d. Create an exit interview for students who leave Mulberry and identify any standardized positives or negatives with the goal to track these as KFIs over time.

e. Track and document each new student who attends Mulberry School, including information on where they learned of Mulberry, why they selected Mulberry, and their long-term progress through high school, college, and careers. Integrate the information into the KFI process with the goals of:

      i. Looking for trends

     ii. Using data in Mulberry marketing efforts

7. Once initial KFI tracking data have been established, determine the best way to capture, data warehouse, construct, and report KFIs. This will establish needs for staffing and/or software. Software should be integrated with the software needed for student tracking (#6 above).

a. Work towards building a system that will allow Mulberry to pull data in these areas: alumni, admissions, attrition, compensation, fundraising, instruction, programs, student assessment, tuition, and tuition assistance.

b. Data should be integrated with those obtained via implementation of goal III.G (Strengthen Alumni Association) below.

8. Create KFI Annual Report segmented for the following audiences:

a. Board of trustees

b. Mulberry team

c. Parents

d. Marketing team

Projected Timeline

1. KFI matrix (Initial spring 2020, ongoing)

2. Director of Enrollment Management KFIs (Q4 2019)
3. Mulberry leadership team training (Q4 2019)
4. CFO KFIs (Q2 2020)
5. Director of Advancement KFIs (Q1 2020)
6. Tracking of each student who attends Mulberry School (Q4 2020)
7. Decisions on capturing, data warehousing, constructing, and reporting KFIs (Q4 2020)
8. KFI Annual Report (Partial start Q4 2019, complete Q4 2020, ongoing)

Personnel Responsible
1. Admissions data (admissions, attrition): Director of Enrollment Management
2. Financial data (compensation, tuition, tuition assistance): Director of Finance
3. Development data (fundraising): Director of Advancement, Development Committee
4. Student learning data (instruction, programs, student assessment): Head of School, faculty, Curriculum Specialist, Student Resource Specialist
5. Market data and data utilization strategy: Marketing Team

Resources Needed
Staffing is needed to make sure these necessary tasks can be accomplished. Hiring of qualified candidates for specific goal areas may be needed.

Software may be needed to integrate data and reporting.

Assessing Progress
1. Progress will be discussed weekly during director-level staff meetings and reported monthly to the board of trustees and faculty.
2. The administration will annually review and evaluate the KFIs, adjust them as needed, and report results to the board.
3. At a higher level, progress is tracked through Open Houses (attendees, packets delivered, applications, etc.), surveys, tours, online reviews, and website performance metrics. Ultimate progress is assessed in terms of increased student enrollment and improved retention rate.

Reporting Progress
Progress will be reported through:
• Regular staff reports to Head of School
• Monthly administration reports to Board of Trustees
• Annual administration report to Board of Trustees on evaluation of KFIs

E. Achieve and maintain CAIS/WASC accreditation
Lead: Strategic Planning/Accreditation Committee

<u>Statement of the Strategic Priority</u>
Mulberry received a two-year CAIS/WASC accreditation in 2015 that was subsequently extended through June 2022. Mulberry will focus on maintaining this accreditation by regularly revisiting the goals laid out in the WASC/CAIS recommendations as well as the Strategic Plan. This Strategic Plan incorporates the recommendations from the accreditation agencies, together with their current status and next steps, with a focus on how progress is measured and how it can be sustained.

<u>Importance of the Goal</u>
CAIS/WASC accreditation helps ensure that Mulberry School is delivering on its stated aims and adhering to the values it claims to foster. The process entails a detailed self-study and an external committee of educational experts and peers providing insights and recommendations for how Mulberry can continue to maintain and enrich the practices by which the school realizes its mission. This process helps guarantee that the school is effective in reaching its goals and provides public assurance of the services that it offers.

<u>Impact on Student Learning</u>
Accreditation touches on all aspects of student learning, from the daily curriculum plan in the classroom to the budget and facilities required to deliver all student services, from faculty teaching to financial sustainability to building community. Successful accreditation ensures that the multiple areas required to sustain Mulberry's mission are reviewed by the school's own community as well as an external partner, and specific steps are outlined that lead toward continued success.

<u>Specific Implementation Steps</u>
The Strategic Planning/Accreditation Committee gathers updates on progress toward achieving goals recommended by CAIS and WASC. The committee integrates these into a progress report that is submitted to the accreditation agencies.

<u>Projected Timeline</u>
CAIS/WASC accreditation is valid through June 2022. The committee will draft a progress report in fall 2019 and submit it to CAIS by February 15, 2020. A new self-study will begin in 2021.

<u>Personnel Responsible</u>
The Strategic Planning/Accreditation Committee in partnership with a broad cross-section of the Mulberry community.

<u>Resources Needed</u>
Time and engagement from Mulberry community members (staff, faculty, parents, students, and trustees) for self-study and progress reports.

Assessing Progress
WASC and CAIS accreditation proceeds via regularly scheduled progress reports, visits, and recommendations. Those recommendations are incorporated into the Strategic Plan, and progress is assessed by the Strategic Planning/Accreditation Committee.

Reporting Progress
The progress of the accreditation process is shared in monthly board meetings. The status of the school's accreditation is shown on the website and in marketing materials. The certificate of accreditation is on display in the school's main office.

F. Develop need-based financial aid policy that actively promotes socioeconomic diversity [CAIS]

Lead: Diversity Task Force

Statement of the Strategic Priority

CAIS Recommendation (Letter of Accreditation, July 10, 2015): A financial aid policy that is need-based, that is open to students of all backgrounds, and that actively promotes socioeconomic diversity, supported by financial resources that are commensurate with student needs and institutional capacity. The policy should move the school over time toward the CAIS averages in terms of aid granted as a percent of overall income, the percent of student population served, and the average grant amount.

Mulberry seeks to cultivate a socioeconomically diverse student body and family community consistent with those of other independent schools and to achieve this in a way that promotes the school's sustainability.

Importance of the Goal

The prioritization of socioeconomic diversity reflects and furthers the idea that Mulberry is a private school with a public purpose. Our aim is not simply to provide an enriching educational experience that is consistent with our values, but to expand the reach of the school's impact in terms of educational philosophy and approach to parenting to families who would otherwise not be in a position to benefit from Mulberry, and to become a service to those in our surrounding communities.

Impact on Student Learning

Greater diversity in socioeconomic background will bring new perspectives into our classrooms and community, perspectives that substantially enrich the learning process for all students. This goal will also allow more families to enroll *and remain* at Mulberry.

Specific Implementation Steps

Since 2015, the school has increased the budget for tuition assistance by 400%, expanded eligibility to new (not just existing) families, consolidated the financial aid program into one direct assistance policy, and expanded assistance to include emergency aid on a case-by-case basis. These significant steps to provide increased assistance have enabled a larger number of families to attend.

Moving forward, the school will continue to increase direct tuition assistance at a rate commensurate with or exceeding the anticipated annual rate of tuition increase (approximately 9%).

Projected Timeline

This is an ongoing process. Annual tuition assistance increases will be measured against tuition increases and percentage of families served.

Personnel Responsible
The board will initiate, oversee, and approve the recommendations of a Socioeconomic Diversity Committee. The committee will conduct research, draft a policy, and make recommendations. The Head of School, Director of Finance, and Director of Enrollment Management will ensure recommendations are financially sustainable and monitor their outcomes.

Resources Needed
1. Current data on assistance to students at CAIS schools (CAIS averages)
2. Data on assistance to families at other local private schools
3. Demographic data (including median household income for Santa Clara County) to know where new families will come from and what areas might be best for marketing

Assessing Progress
1. Progress on financial aid will be assessed by tracking the percentage of families receiving tuition assistance (or modified tuition levels), as well as what percentages of tuition are covered, over time and mapping those data against median household income.
2. The Director of Enrollment Management will continue to monitor attrition based on financial burden and report these statistics on a monthly basis.
3. The school will conduct surveys of the community measuring families' perceptions of Mulberry as a welcoming, inclusive, supportive environment. The desired outcome is to help socio-demographically diverse families visualize belonging to the Mulberry community, either by example or through developing feelings of inclusion. These families have meaningful avenues for buy-in and access to the Mulberry program. They do not feel it necessary to "sell out" to be fully accepted in the Mulberry community.

Reporting Progress
Progress will be tracked and reported through the board's quarterly review of its Strategic Plan goals. Committee work is reported at monthly board meetings.

G. Strengthen Alumni Association
Lead: Alumni Committee

Statement of the Strategic Priority
To achieve ongoing and consistent alumni engagement through Mulberry's established Alumni Association.

Importance of the Goal
The Mulberry community has never been limited to the families currently enrolled. Many families have formed bonds that have lasted for decades. The school wants to further those connections and continue building an extended, multigenerational Mulberry community— including, as future Mulberry students, the children and grandchildren of our alums.

Strong alumni connections will allow those children and grandchildren to experience some of the Mulberry culture and traditions, even if they do not attend the school. It is hoped that greater alumni engagement will also increase alumni donations to the school, furthering our development goals.

Finally, ongoing alumni contact enables the school to accurately inform potential families what comes of a Mulberry education. Alumni success is evidence that our progressive school provides a solid foundation in preparing for life. Potential Mulberry families are interested in learning what high schools, colleges, and graduate schools our alums have attended; what careers they have pursued; and what other important events have marked their lives.

Impact on Student Learning
Exposing current students to the progress of alumni inspires them, bringing the benefits of education alive. Mulberry can also learn from the experiences of alumni to adjust its curriculum for current students. Further, maintaining the connection extends the learning benefits of Mulberry even after students graduate, helping them apply lessons learned at Mulberry as they navigate through their later schooling. Finally, encouraging alumni to financially support Mulberry gives the school additional funding to continue to improve student learning.

Specific Implementation Steps
1. Identify a Mulberry team (staff) member to be responsible for the alumni program.
2. Consolidate the various alumni and alumni parent contact lists of all team members into a centralized database. Wherever possible, identify the class and year of the alum.
3. Produce a written operational plan for the alumni program. This will include examining the benefits of gathering additional contact information versus the effort and resources needed to do so, which may be significant.
4. If it is decided to gather additional alumni contact information, build a team of three people, including one PAC member or other community volunteer, to accomplish the goal. The process might look like this:
   a. Contact each known alum (email, phone, mail). Explain that we are building the alumni database and why, and ask them to respond with any contact information

they may have for themselves or other alumni. Integrate the information into the centralized database.

  b. Where we have parent contact information only, contact the parent (email, phone, mail), explain what we are trying to accomplish, request the current alumni contact information, and add new information to the database.

5. Utilize the existing Facebook alumni site to:
   a. Ask for past alumni contact information
   b. Post current Mulberry photos and stories to support alums' continued emotional connection with Mulberry
   c. Post (with permission) and ask for alumni photos and stories

6. Add an alumni section to the Mulberry website with photos and stories. Ask for additional alumni contact information, providing a contact link.

7. Organize the process of including alumni in Mulberry student/parent programs during the school year. At every event, ask alumni for updated contact information for themselves and their friends. Track alumni attendance at these events.

8. Review progress annually. This process should include:
   a. Looking at the numbers (e.g., what approximate percentage of alumni are now in the database? How many alumni have been attending student/parent events, and is there a trend in these numbers?)
   b. Adjusting the plan as needed (e.g., trying out more/different communication methods, adjusting the frequency of communication, determining whether contact information is still current and establishing process for checking/updating)
   c. Adding contact information for that year's graduates and their families and making sure they are on all appropriate lists (e.g., for school events)

Projected Timeline
1. Identify a Mulberry team (staff) member to be responsible for the alumni program (Q4 2019)
2. Consolidate the various alumni contact lists (Q4 2019)
3. Prepare operational plan (Q1 2020)
4. If the plan includes gathering additional alumni contact information, build a team of three people (Q1 2020)
5. Gather contact info from alumni (Q4 2020)
6. Establish an owner for the Facebook and Mulberry website alumni pages (Q2 2020)
7. Formalize Facebook and Mulberry website alumni pages (Q2 2020)
8. In the long term, integrate the alumni dataset as part of the student tracking software as outlined in goal II.D above

Personnel Responsible
1. The staff member identified as responsible (step 1 above)
2. Staff with current databases that need to be integrated (including Director of Enrollment Management, Director of Advancement, Head of School, possibly faculty)

Resources Needed
1. A team of three people focused on the goal
2. Mulberry team (staff) resource time
3. Volunteer (PAC?) resource time
4. Short-term centralized database
5. Student tracking software (see goal II.D above) capable of long-term integration of the alumni dataset

Assessing Progress
Progress will be measured by the following accomplishments:
1. Robust and accurate alumni database
2. Operational plan in place and updated annually
3. Increased alumni presence at Mulberry events
4. Continual alumni engagement year after year
5. Increased alumni response to outreach
6. Continued monitoring of alumni outreach methods
7. Increased alumni-tied donations

Reporting Progress
Monthly administration and Alumni Committee reports to board of trustees, as needed
Annual administration and Alumni Committee report to trustees after review of plan and accomplishments