

The background of the entire page is a teal-tinted photograph of a field of pansies. The flowers are in various stages of bloom, with some in sharp focus and others blurred in the background. The overall color palette is a monochromatic teal and green.

# Burke's

KATHERINE DELMAR BURKE SCHOOL  
STRATEGIC PLAN 2007

## OVERVIEW: STRATEGIC PLAN 2007

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*In the fall of 2006 the Katherine Delmar Burke School Board of Trustees initiated a strategic planning process to provide a compelling guide for school initiatives as we enter our second century. Having successfully completed extensive program and facilities improvements mandated by our most recent strategic plans, we were ready to move forward on sound footing toward new challenges. This plan is written with confidence in and excitement for our future as we celebrate our one hundred year legacy.*

*We began the strategic planning process with a weekend retreat during which over 70 members of the school community discussed Burke's history, present and future. The retreat participants included parents, trustees, alumnae, parents of alumnae, educators and Burke's teachers and administrators, who identified potential areas of interest and focus for our school. To facilitate this strategic planning process, the Board hired Anne-Marie Pierce, President of AMP & Associates, an educational consulting firm for independent and international schools.*

*The Board of Trustees synthesized the retreat findings and identified areas of particular relevance to Burke's today and in the foreseeable future. Each area was assigned to a small sub-committee of trustees, parents and administrators who then did further analysis and wrote the context and objectives for each section of the plan.*

*The Board of Trustees adopted the strategic plan on June 4, 2007. This plan celebrates the strength of our education for girls and provides impetus for our continued work on program, community and physical and human resources. The Board of Trustees will next put into place implementation committees that will chart our ongoing progress with respect to this plan's goals.*

*The plan challenges us to keep our students and program in the forefront of all of our work. Given the range of students that we enroll, it points particularly to identifying whom we serve, what we expect our girls to learn and how they learn best. It challenges us to maintain our traditional strengths while inviting innovation, expanded opportunities for curriculum assessment and development and collaborative hands-on learning for our girls.*

*The plan challenges us to preserve and build upon the strength of our inclusive community with its diverse population and strong multicultural program. The plan identifies not only our need for effective outreach to potential school families, but also the importance of providing educational opportunities for our trustees and families to help build a better understanding of the needs of schools today.*

*The plan challenges us to revisit all aspects of school financing with particular attention to revenue sources as well as expenses. It points directly to the growing tension between what it costs to provide excellence in education and the need to slow the escalation of tuition and fees. It compels us to be effective stewards of our own facilities and of the physical world in which we live.*

*The plan concludes with a challenge to communicate more clearly and consistently the magical combination of serious purpose and eager exploration that so strongly characterizes education at Burke's. Included in this section is the importance of our alumnae and a charge for us to bring our graduates more directly into the present life of the school.*

*This strategic plan is both ambitious and reasonable. This document will be used to establish yearly administrative and board goals with the flexibility to change over time. The plan will be revisited regularly to track progress and continued relevance to the work of the Board of Trustees and the school, while charging us to continue to build on our strong academic tradition and our commitment to providing the best possible education for girls.*



Jennifer Gridley  
President, Board of Trustees



Jessie-Lea Abbott  
Head of School

September 2007

# Burke's

EDUCATE, ENCOURAGE & EMPOWER GIRLS

Burke's prepares able, motivated girls for academic challenge, life in community and lifelong love of learning. Burke's celebrates childhood as the best preparation for adulthood, enabling girls to take risks and become confident in who they are. Burke's embraces individual and cultural differences, teaching that each girl can make a difference in her world.

## CORE VALUES

In keeping with Burke's 100-year heritage, we are committed to providing the best in education for girls and to enhancing our rich traditions, making them relevant for each generation. Our core values focus our energy, guide resource allocation decisions and are the anchor for all of our plans. Our values distinguish Burke's – its history, its strengths, its accomplishments and its aspirations for girls.

Education at Burke's is characterized by high academic achievement partnered with the skills, habits, attitudes and self-knowledge that are essential tools for a lifetime of learning. Our teaching is grounded in the best scholarship in child development and learning for girls. We believe that physical and emotional well-being are critical for academic growth. We instill in our students a joy of learning and discovery, the habits of an intellectual life and the strength and integrity they will need to shape their world.

We believe that the best educational environment for girls is one in which differences are present, recognized and valued. We embrace the differences that shape perspectives held by members of our community and recognize the essential lessons that our girls learn from the resulting breadth of academic, cultural and social experiences. We believe that girls more readily learn to think critically and to develop a well-founded point of view when they are challenged to view the same topic from a variety of perspectives in concert with others who bring varied backgrounds and experiences to the conversation. We are committed to building an academic program that emphasizes the educational value of differences and the importance of enabling full participation for all community members.

Burke's encourages habits of caring, engagement and civic responsibility by including in our curriculum age-appropriate service learning opportunities within and outside the school. We believe that essential components of education are global awareness and environmental sustainability.

We believe that a learning environment based on these values leads to educational excellence as well as positive personal outcomes. Our graduates enter high school as confident learners and leaders. They make meaningful contributions to their communities. They live productive and creative lives characterized by a thirst for learning and a strong understanding of how they can help sustain our physical and social worlds.

## EDUCATIONAL PROGRAM

Education at Burke's is characterized by exploration and achievement partnered with personal growth and practical applications of academic learning. We take advantage of traditional as well as contemporary scholarship in child development and education for girls. Physical education and emotional development are essential components of our program. We believe that lasting and effective learning is best fueled by success. Thus, we plan our program to match challenges and learning opportunities with increasing levels of understanding and skill, and we provide explicit recognition of accomplishments. We view differences in learning styles and perspectives as elements that enrich our program and contribute to each girl's growth as an individual. We believe that an engaging, interdisciplinary, developmentally appropriate program fosters deep and broad mastery of concepts, skills and content in all disciplines and an eagerness for learning that extends throughout our girls' lives.

### CONTEXT

*To maintain our program's relevance in a rapidly changing world, we must continue to examine fundamental questions in its content and design. Central to these questions are: what our girls learn, how they learn and how best to assess and develop our school program to sustain and enhance curriculum integrity while responding to changing needs and pedagogies.*

### OBJECTIVES

- 1. Clearly identify and articulate what we expect our students to learn.*
  - Evaluate the program to ensure that the pace and scope are developmentally appropriate.
  - Consider expanding program areas such as environmental sustainability, media literacy and foreign language and continue to strengthen our performing and visual arts programs.
  - Evaluate and develop innovative programs that enhance core values, such as a comprehensive multicultural academic program that includes scope and sequence, competencies and benchmarks.
- 2. Continue to examine how our girls learn and how our school practices best support their learning.*
  - Research and assess homework to determine whether a more productive balance can be achieved between reinforcing skills and concepts, and allowing time for extracurricular activities and family life.

- Evaluate and reorganize the school schedule to permit more opportunities for hands-on learning and continuity in projects, reduce stress and provide more time for teacher collaboration.
- Expand and integrate collaborative learning and interdisciplinary study as essential components of classroom practice.
- Enhance curriculum integration to reinforce concepts and skills and avoid redundancy.

### *3. Further develop and institutionalize existing procedures for program assessment and improvement.*

- Provide additional resources for systematic school-wide program evaluation including outside resources as appropriate.
- Create a timetable for that work.
- Inform program assessments by systematically gathering information from high school educators and graduates to augment information gathered from parent surveys.



## AN INCLUSIVE LEARNING COMMUNITY

The strength of the school community is an essential feature at Burke's. Recognizing the rapid pace of change in education today, we expect all members of our community to be engaged in learning – parents as well as students, teachers and staff. We believe that every girl learns best when she is supported by adults who work as partners, each playing a distinctly different role and together providing effective links between her school experiences and how she can apply them positively to her outside community. With our population of diverse families and individuals, our common ground is a belief in our core values, a commitment to professional expertise and a shared dedication to our students and this school.

Building and maintaining an inclusive community are at the heart of our work. This improves our academic program and makes a Burke's education current in today's increasingly multicultural reality. An inclusive community requires diversity coordinated with a multicultural curriculum. Thus, we strive to make diversity and multiculturalism valued and conscious elements of our institutional identity. We have well-established educational practices in support of this work that raise the level of excellence in all aspects of our program.

Binding the differences in our student body is the expectation that each student will become an active young woman who is eager to learn and will be able to apply what she learns to the betterment of herself and others. Our students simultaneously contribute essential strengths to our community and benefit from the breadth of experience available to them at Burke's.

### CONTEXT

*The content and scope of education is constantly changing. In order to maintain the strength of our program and school, it is essential that we more clearly identify and support the range of students that we enroll. We must continue to attract and retain teachers and staff of the highest caliber, and provide educational opportunities for our families in support of our students and our programs. To achieve these goals, we need to develop common language so that in our conversations and planning all members of the school community can work together to support our work.*

### OBJECTIVES

*1. Continue to expand Burke's capacity to serve the wide range of girls that we enroll.*

- Reaffirm and sustain our commitment to being an all girls' school that takes advantage of current research and knowledge about how best to meet the needs of elementary and middle school girls.

- Within the broad spectrum of students that Burke's recruits, clarify and periodically review what range of student the school best serves academically and emotionally.
- Continue to develop our Extended Care and After School Enrichment Program so that girls who stay on campus after academic school hours have enticing and enriching options.

*2. Improve our ability to attract a broad and diverse pool of qualified applicants so that we can recruit, enroll and support students who are currently in the minority at Burke's.*

- Create an Outreach Committee comprised of current parents and the Director of Admissions to develop and implement a proactive preschool outreach program.
- Identify families currently in the minority at Burke's to serve as ambassadors and as a resource for families of prospective students.
- Determine how best to increase the enrollment yield from existing pools of incoming students who enhance diversity at Burke's.
- Revise financial assistance materials to make certain that they are inviting, accessible and understandable.

*3. Promote broader knowledge, confidence and support by educating Burke's families about educational philosophy, professional practices and advances in education.*

- Provide parent education materials and opportunities. Emphasize and explain those aspects of our program that may be different from family expectations derived from their own educational experiences (e.g. learning differences, brain research, learning for girls, standardized testing, diversity and multiculturalism, inclusive community, ethics and social development).
- Improve family-school communication with regard to individual student progress and learning. Include student assessment training and resources for teachers as well as strategies and practices that help parents and teachers work more effectively together.
- Continue to use parent survey results or other instruments to gauge family understanding of Burke's values, philosophy and beliefs.

*4. Formalize policies, guidelines and practices that support our efforts to develop a culture of inclusiveness and that recognize diversity, multiculturalism and an inclusive community as essential components of excellence in education.*

- Define terms such as diversity, multiculturalism and inclusion so that families, trustees, teachers, staff and students understand and use a shared vocabulary.

- Use this common language and understanding throughout all of Burke's internal and external communications.
- Provide ongoing multicultural education and training for trustees, parents, teachers and staff.
- Create programs to educate families on the latest research and understanding about multiculturalism and how it enhances academic and personal growth and achievement.
- Include anti-bias training in all programs designed to train and orient new trustees, Parents' Association leadership and other pivotal school volunteer positions.

*5. Continue to attract, hire, retain and support outstanding teachers and staff, including those who represent diversity. Ensure that all teachers and staff understand and support the advantages of multiculturalism in an inclusive educational community and that all institutional practices support this goal.*

- Recruit qualified teachers and staff locally and nationally who will bring the best professional practices to Burke's and who will join in our collaborative professional community.
- Continue to assess appropriate levels of staffing.
- Continue to assess the school's hiring process to ensure that it supports all aspects of this objective.
- Further develop an inclusive work environment, where all teachers and staff are recognized, appreciated and respected regardless of gender, ethnicity or sexual orientation.



## FINANCIAL & OPERATIONAL SUSTAINABILITY

Burke's has enjoyed a century of financial stability and responsible planning in support of its program. The school maintains central principles such as the importance of a balanced budget while it responds to contemporary financial realities and the needs of its families and staff. Burke's was an early supporter of offering financial assistance in order to enroll students from broad economic backgrounds and was a pioneer in the realm of after school childcare for working parents. Burke's makes a strong commitment to providing professional development opportunities for its staff. Its overriding commitment is to provide the funding necessary to sustain and improve the excellence of our program, to preserve and improve our expansive physical plant and to plan responsibly for the future of the school.

### CONTEXT

*Financial pressures impacting Burke's and other independent schools include the cost of academic excellence, competitive compensation for staff, financial assistance, physical plant needs and maintenance and the need to contain the escalation of tuition increases. Compensation is an ongoing concern as it directly influences our ability to attract and retain staff of the highest caliber. To maintain programs and facilities that differentiate Burke's from other schools, we must be committed to exploring and implementing initiatives to balance the tensions between our increasing expenses and our relatively limited sources of revenue.*

### OBJECTIVES

#### *1. Refine Burke's financial forecasting methodology.*

- Review all operating assumptions – consider all direct and indirect costs (e.g., deferred maintenance, depreciation, contributions to reserves).
- Identify areas for increased operating efficiencies.
- Use our financial forecasting model for short- and long-term decision-making, quantifying the financial impacts of operating decisions, measuring any resulting funding gaps and prioritizing projects.
- Use our financial model to forecast target endowment needed to sustain our desired level of operations, including an estimated timeline to achieve target levels.

#### *2. Develop a culture of giving and the recognition of fundraising and endowment as essential and enduring components of independent school life.*

- Aggressively increase our fundraising efforts including grants and other non-parent sources of revenue.
- Build on the fundraising success of the *Second Century Project* with a campaign to increase endowment.
- Evaluate the effectiveness of Burke's current fundraising strategies and programs.
- Increase focus on alumnae giving and legacy gifts.

#### *3. Maximize revenue opportunities from existing resources to relieve future pressures on tuition increases and consider alternative models for school financial planning.*

- Increase non-tuition operating revenue.
- Analyze alternatives to improving endowment returns and growing Burke's endowment.
- Analyze income-generating opportunities that build on Burke's unique attributes including possibilities such as summer programs, adult courses and other uses of school property.

#### *4. Preserve and support the high quality of our teachers and staff through creative approaches to compensation and professional growth.*

- Review the compensation package, including salaries and benefits such as medical and retirement plans, housing and childcare assistance to attract and retain the best-qualified teachers and staff.
- Ensure that our staff compensation is both competitive and adequate for Bay Area cost of living standards.
- Increase funds available for professional development to support teachers and staff.

#### *5. Preserve, enhance and optimize our physical plant through a proactive and environmentally responsible approach to campus maintenance and improvements.*

- Appropriately fund maintenance, including depreciation, as a part of Burke's annual budget so as to eliminate deferred maintenance.

- Provide state-of-the-art facilities including systems for security and technology, and work towards becoming a “green campus” that celebrates our expansive facilities and provides a model to be emulated by others.
- Prioritize future projects based on programmatic needs and return on investment of time, energy and financial resources.

#### *6. Maintain and expand Burke’s use of financial assistance as a tool for strengthening the school community.*

- Analyze the level of financial assistance that Burke’s can reasonably sustain.
- Analyze potential sources for funding financial assistance above and beyond Parents’ Association fundraising and tuition.
- Consider alternative ways to deliver financial assistance.
- Create a financial assistance application process that promotes transparency and emphasizes clear and timely communication to and from Burke’s and its families.
- Address affordability issues such as how to help families identify the hidden costs of independent school education, the likely tuition increases going forward and strategies for addressing the tension between a Burke’s education and cost of living increases.



## IV COMMUNICATIONS

Burke’s is committed to communicating with all school constituencies on a regular basis to establish, maintain and enhance understanding of our mission, excellence and core values. The overarching goal is to inform and educate our various audiences about the academic and programmatic excellence of the Katherine Delmar Burke School. Further, the school will be proactive in its outreach beyond our immediate community of current Burke’s families, teachers and staff to alumnae and prospective members of the community. Burke’s is committed to being both a good neighbor and a visible and engaged institution, while strengthening the school’s position as a leader in girls’ education.

### CONTEXT

*As a leading independent girls’ school in San Francisco, Burke’s has extensive internal and external audiences with which it communicates. While the method, frequency and focus of communicating with these audiences vary, the content and images of our central message must be delivered consistently and repeatedly to help ensure that perceptions about Burke’s are commensurate with the quality of its programs, teachers and facilities. This is especially important given the increasingly competitive environment for students and resources facing independent schools in the Bay Area. Moreover, the current changes at Burke’s – the largest capital project and campaign in our history, the start of our second century and our Head of School transition – underscore the need for clear and compelling communications within and outside Burke’s community.*

*Burke’s has a base of nearly 2,800 living alumnae, but maintains an active relationship with only a small percentage of this group. Burke’s centennial provides an excellent opportunity for the school to reach out to all alumnae. In addition, Burke’s has the opportunity to continue to build an effective partnership with our neighbors and the broader community based on the recent work of the Second Century Project.*

### OBJECTIVES

*1. Consistently articulate Burke’s mission, key strengths and core values across school communications and to all school audiences.*

- Conduct a communications audit and assessment, evaluating all existing Burke’s materials and communications needs.
- Determine three to five key strengths or attributes of the school that will form the foundation of its “branding” or marketing message.

- Use these key messages in all marketing communications, including written materials, on-line and verbal communications.
- Establish more consistent use of school nomenclature to strengthen and reinforce Burke's identity.
- More fully utilize *Educate, Encourage & Empower Girls* in communications and refine Burke's full mission statement to expand on this concept.
- Communicate all of the above to Burke's current families, teachers and staff, who comprise our most important audience and most influential marketing channel.

*2. Refine Burke's graphic identity to more clearly define and differentiate our school. Burke's materials should continue to be professional in appearance and quality, and also convey qualitative attributes that reinforce Burke's position and image.*

- Centralize oversight of communications and commit sufficient resources to ensure graphic quality and messaging consistency.
- Revise and publish graphic identity guidelines.
- Introduce new graphic identity and refined messaging in admissions materials.
- Apply new graphic identity to all school materials including signage, print and electronic communications.

*3. Develop Burke's alumnae and alumnae family relations through a comprehensive outreach program that increases the frequency and quality of our interactions. This will keep Burke's relevant and increase the number of alumnae who are engaged in the life of the school.*

- Continue to actively involve alumnae in the planning and execution of all aspects of the centennial celebration.
- Develop alumnae communications strategies that specifically address their interests and perspectives.
- Leverage existing on-campus special events – from *Family Festival* to Symposium – to provide more opportunities for alumnae to return to their school.
- Evaluate the effectiveness of existing alumnae-specific Burke's events such as the alumnae luncheon and pen pal program, and amend or change them as appropriate.
- Create an interactive alumnae page on Burke's website and regularly update its content.
- Feature alumnae profiles and accomplishments more prominently and more frequently in school events and communications.

- Develop an alumnae speaker program for our students.
- Define more clearly the roles and responsibilities of the Alumnae Board and identify additional leadership opportunities for alumnae.

*4. Increase Burke's visibility as a leader in girls' education and as a community leader on relevant and important educational issues.*

- Spearhead initiatives and opportunities for Burke's to be a leader in civic and social responsibility.
- Explore potential collaborations with other schools, educational organizations and neighborhood, cultural and civic groups to further our shared objectives.
- Take full advantage of the community outreach and leadership positioning potential of existing school programs such as Symposium.
- Use our centennial celebration as an opportunity to reiterate and enhance Burke's leadership role in girls' education.



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