



# Strategic Plan

2022-2025

Swallowtail  
Waldorf  
School & Farm



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# OUR MISSION AND VISION



ARTISTICALLY EDUCATING THE WHOLE CHILD.  
INSPIRING GRATITUDE AND REVERENCE FOR HUMANITY, NATURE,  
AND LIFELONG LEARNING.

When we begin the process of strategic planning, it is helpful to first look back and ask some basic questions: Why does Swallowtail School exist? What was the impulse behind its founding, and what has the school's journey looked like so far? These questions help us align on a common vision as the community moves forward.

Swallowtail School was founded in 1995, in a log cabin in Gales Creek, by Lauren Sheehan. A musician and educator herself, she brought a passion for environmental and arts education that continues in the culture of the school today. A highly involved parent community was also a part of Swallowtail from the beginning, helping to shape the school and create the warm, supportive, and creative ethos that makes Swallowtail unique. Caring teachers completed the picture, bringing a deep respect for childhood and a personal commitment to the mission of the school.

Over the years, Swallowtail has been on an incredible

trajectory of growth. Enrollment increased from the original 7 students to the 172 who started the 2022-23 school year in September. The school moved around often at first, and then settled into a long-term lease in Hillsboro before purchasing its forever home in Cornelius in 2016. Along the way the school acquired a 26-acre parcel of farmland, fulfilling the original vision of environmental education. There, students experience regular, sustained immersion in a natural space and develop a lifelong reverence for the natural world.

Exciting projects are in the works – from grant funded restoration work at the farm property to development of the grounds at the main campus. While budgeting with care and precision, Swallowtail is in a new place of financial stability, with adequate reserves, planned long-term maintenance, and a balanced budget. Swallowtail School is now in position for thoughtful, intentional planning of its next phase of growth and development.

# STRATEGIC PRIORITIES



As a community, we identified four key areas of focus for strategic planning. They represent the core values of our community and the areas where we see Swallowtail is most poised for growth. They are: The Farm, Student Learning, Faculty Support, and Diversity, Equity & Inclusion.

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In 2019, we used listening sessions with faculty, staff, families, and students to define the characteristics of Swallowtail that make us unique - the way we explore, create, and celebrate together.

In 2020 we took some time to align on a common vision for the school's path forward before getting into the details of strategic planning for the next 3 - 5 years. We sent surveys to alumni, faculty, and families and conducted longer conversations with many of the survey respondents.

We asked each respondent what initially brought them to Swallowtail, what strengths did they see in the school, and what challenges or areas for growth did they foresee as Swallowtail moves into the next phase?

Through those surveys we identified the areas listed above, as well as a Guiding Vision for each area.

Our work this year was to articulate the steps that we can take over the next three years to help bring those Guiding Visions into reality. Using the Guiding Visions as our framework, the Core Council and Board of Trustees worked with various committees and the faculty and staff to shape the resulting Strategic Plan that is presented here.

Thank you to everyone who contributed their time, energy, and ideas to help bring this plan into being!





*Our highest endeavor must be to develop free human beings, who are able of themselves to impart purpose and direction to their lives.*

*The need for imagination, a sense of truth, and a feeling of responsibility - these three forces are the very nerve of education.*

*~ Rudolf Steiner*





# THE FARM

To develop a robust, fully integrated environmental stewardship and farm program that distinguishes Swallowtail in the surrounding educational landscape.



# THE FARM

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## 2022 - 2023

- Parking Lot Construction
- Determine the future of the farmhouse
- Focus on relationships with existing grant partners for pollinator meadow and restoration areas
- Continue to develop Environmental Stewardship curriculum
- Plan student section of Ecological Enhancement Plan



## 2023 - 2024

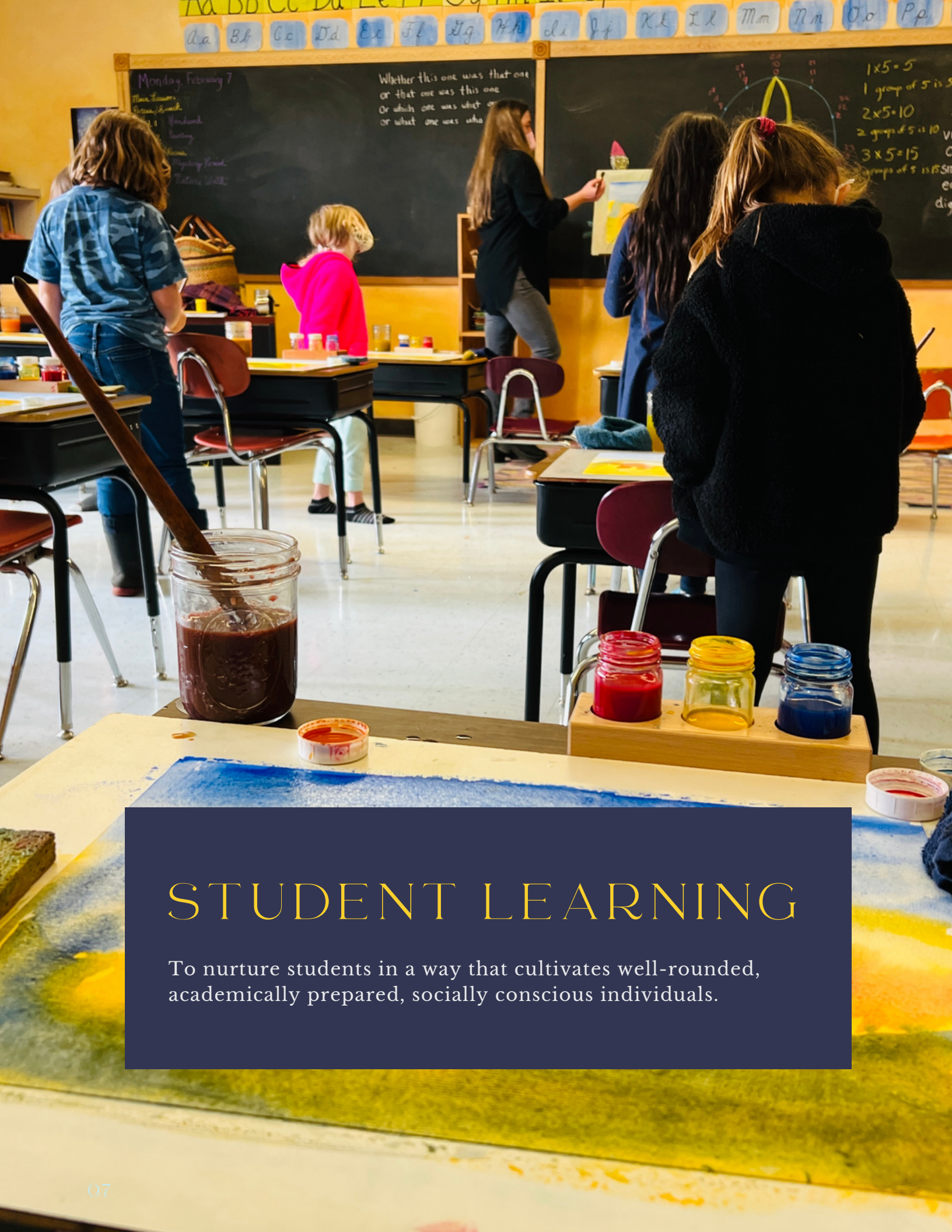
- Complete water use survey and obtain use permits
- Follow through on decision about farmhouse
- Plant/maintain student section of EEP
- Opportunities for alumni connections
- Summer Camps
- Take on monitoring of land restoration

## 2024 - 2025

- Develop sustainable agriculture program
- Develop more covered spaces
- Community garden, at main campus or farm
- Continue work on farmhouse remodel
- Begin to increase/grow community partnerships
- Continue to connect the main campus to the impulse of Environmental Stewardship program







# STUDENT LEARNING

To nurture students in a way that cultivates well-rounded, academically prepared, socially conscious individuals.



# STUDENT LEARNING

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## 2022 - 2023

- Student Support Coordinator
- Reading and Math Support
- In-school Counselor
- Form picture of % of students on track with grade level academic benchmarks
- Develop benchmarks for social/emotional learning
- Strengthen connections between Grades and EC

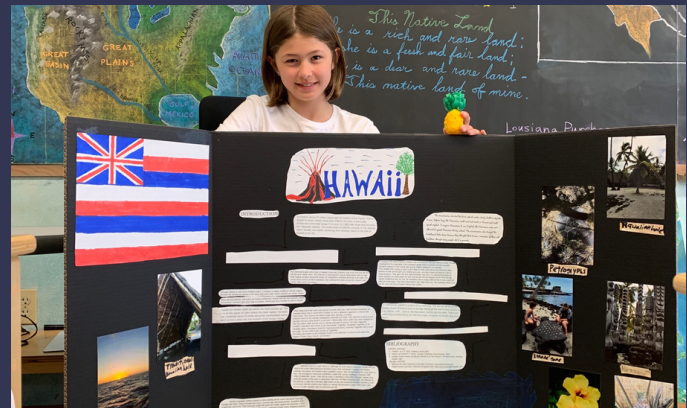


## 2023 - 2024

- Set targets for % of students on track with grade level academic benchmarks
- Alumni panels to connect with students and families
- Create volunteer opportunities for alumni
- Share alumni successes with community

## 2024 - 2025

- Track specifics of alumni success (test scores, high school readiness, college, etc)
- Continue to build programming as budget allows, with eventual goal to have a balanced program that meets the needs of all of our students
- Develop strategies to increase % of students on track with benchmarks





# FACULTY SUPPORT

To recruit, retain, and reward dynamic, engaged faculty who embrace ongoing learning and work in partnership to explore innovative, relevant programming.





# FACULTY SUPPORT

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## 2022 - 2023

- Increase base pay
- Offer financial support for teachers who are pursuing training
- Strengthen mentoring program - both with in house and external mentors



## 2023 - 2024

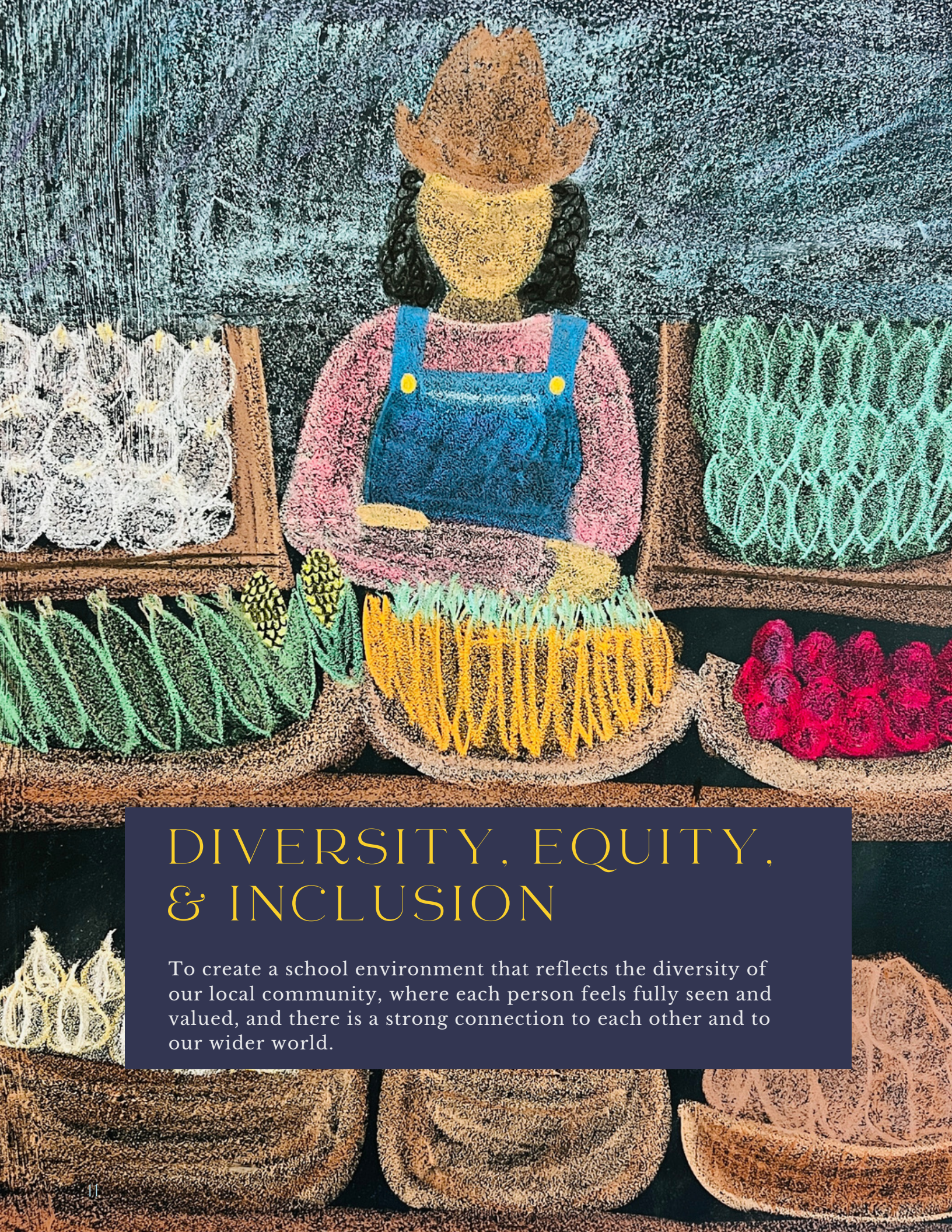
- Increase base pay
- Increase funds available for professional development
- Begin to provide medical benefits

## 2024 - 2025

- Incorporate cost-of-living increase into annual pay calculations
- Maintain pay level that is competitive with other schools
- Hold our own workshops for professional development
- Ongoing goal of a full time pedagogical chair and full benefits







# DIVERSITY, EQUITY, & INCLUSION

To create a school environment that reflects the diversity of our local community, where each person feels fully seen and valued, and there is a strong connection to each other and to our wider world.



# DIVERSITY, EQUITY & INCLUSION

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## 2022 - 2023

- Continue to build community partnerships in Cornelius
- Complete festival life calendar (connecting to local community and school identity and culture)
- Add line item to budget to commit to funding DEI development
- Continuing faculty and staff education



## 2023 - 2024

- Develop benchmarks for student learning
- Make our campus more warm and welcoming and explicitly welcoming to people of color
- Increase engagement with the community - open school campus to neighbors
- Look for ways to increase enrollment from local community

## 2024 - 2025

- Continue to look for ways to increase enrollment from the local Cornelius community
- Begin to build partnerships with local elementary and middle schools





# OTHER GOALS

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## 01 SCHOOL LEADERSHIP

Our school leadership groups include the Family Association, the Board of Trustees, and the Core Council. We have strong membership in each group and are excited for the opportunities that are emerging!

In a school of our size and age, it is typical for these groups to move out of an ad hoc role of supporting operations where needed and into a more planned space of creating their own goals and driving forward the progress of the whole school. Each of our leadership groups will be engaged in this important transformation over the next few years.



## 02 FINANCIAL STABILITY

Many schools choose to make financial stability one of their top goals. We discussed that option but ultimately agreed that financial stability is the result of work in other areas, rather than a goal in its own right. Of course we will continue to budget responsibly and plan our expenses with intention, but the biggest influence on financial stability is predictable income and enrollment.

Strong enrollment will flow naturally out of achieving excellence in the areas of focus outlined above, and we are already seeing the impact of our work. We will start the 2022 school year with the highest enrollment in the history of the school, and have averaged 18% growth each of the last two years.

## 03 CAPITAL CAMPAIGN

A change to city zoning laws has opened up exciting opportunities with the farm steward's residence, which is in need of significant repair or replacement to be habitable. Over the next year a work group will research permitting requirements and feasibility of different options, and will put together a plan that might include tiny homes or some kind of shared housing. This would be a benefit for our faculty, interns who wish to learn about our way of farming, and the property itself, which always benefits from on-site caretakers.

We will also work over this year to understand the cost of the end vision, and to put together a campaign to engage alumni, current families, and other community donors to begin bringing that vision into being. Stay tuned for more information!



# JOIN US ON THE JOURNEY

GET INVOLVED!

## **FAMILY ASSOCIATION**

Festivals  
Social Connection  
Family Education  
Supporting our Teachers

## **BOARD OF TRUSTEES**

Legal & Financial Considerations  
Long Range Planning  
Vision and Mission

## **IDEA COMMITTEE**

Inclusion, Diversity, Equity, and Access at  
Swallowtail  
Connections to the Community  
Considerations in developing our physical  
space, planning curriculum, and  
celebrating festivals

## **BUILDING & GROUNDS COMMITTEE**

Facilities Maintenance  
Asset Management  
Development

## **FARM COMMITTEE**

Program Development  
Grant Work  
Site Development  
Permits and Construction Experience  
Sustainable Agriculture  
Land Restoration

## **AUCTION COMMITTEE**

Procuring Items  
Design and Decor  
Themes and Marketing

## **FINANCE COMMITTEE**

Financial Oversight and Control  
Reserve Analysis  
Contingency Planning

## **MARKETING COMMITTEE**

Overall Marketing Strategy  
Aesthetics and Branding  
Supporting Outreach Events





SWALLOWTAIL  
WALDORF SCHOOL  
& FARM



THANK YOU FOR YOUR SUPPORT!

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