



Celebrating Our Success





It takes more than one
person to make a path.

AFRICAN PROVERB

During the summer of 2005, the Board of Trustees launched a comprehensive planning effort to map out Bertschi School's strategic direction for the next five years. This undertaking engaged trustees, faculty, staff, parents, and community members in conversation about the mission and vision of the school. The primary question on the table was, "Where do we want to take Bertschi and how do we get there?" Over the course of nine months, that same query was asked in community forums, focus groups, surveys, and retreats. The result of these discussions was the development of the ambitious and exciting **2006-2011 Strategic Plan** that identified five key areas for action:

- What do we see as the academic, social and emotional goals for our children?
- How do we prepare for a leadership transition and institutionalize Brigitte's legacy?
- How will we achieve new levels of financial sustainability under current financial constraints and future trends?
- How do we define our niche in the marketplace?
- How do we develop a culture of giving that includes all families and appropriately supports the school?

Winston Churchill once advised, "However beautiful the strategy, you should occasionally look at the results." Now is the time to do just that. As we work to fully implement the vision for Bertschi articulated in the strategic plan, we would like to share our many accomplishments of the past five years. These achievements represent the uncompromised commitment and relentless work of many, many people, for which we are most grateful. The legacy of Bertschi School — now spanning 35 years — has been built and will be sustained by thousands of people in the extended school community who believe in and support our mission:

**Bertschi School educates children to become
compassionate, confident and creative learners
in a global community.**



goals



STRATEGIC ISSUE: WHAT DO WE SEE AS THE ACADEMIC, SOCIAL AND EMOTIONAL GOALS FOR OUR CHILDREN?

The social and intellectual capabilities of Bertschi graduates are well known. Now more than ever, we believe it is important to continue developing well-educated and caring students who are equipped to thrive in the increasingly global, diverse, and technological world of the 21st century. We are preparing students for jobs that don't yet exist, using technologies that haven't been invented, in order to solve problems we cannot envision. Continuous improvement must be a driving force in the school's curriculum and culture.

ACCOMPLISHMENTS

- Completed and integrated a new technology plan, focused on age-appropriate learning and incorporating International Society for Technology Education (ISTE) and National Educational Technology Standards (NETS) guidelines.
- Implemented "The Virtues Project" school-wide, which is focused on the renewal of kindness, justice, and integrity and honored by the United Nations as a "model global program for all cultures."
- Enhanced and expanded resource class learning experiences with the addition of new spaces for drama, music, art, library, dance, physical education and science/technology.
- Developed and implemented an integrated sustainability curriculum across all grade levels, achieving level one certification by Washington Green Schools.
- Launched a new math program, *Envision Math*, which incorporates differentiated instruction in both digital and traditional formats.
- Introduced literature circles in grades K-5, guiding students to a deeper and more personal understanding of what they read and write.



vision

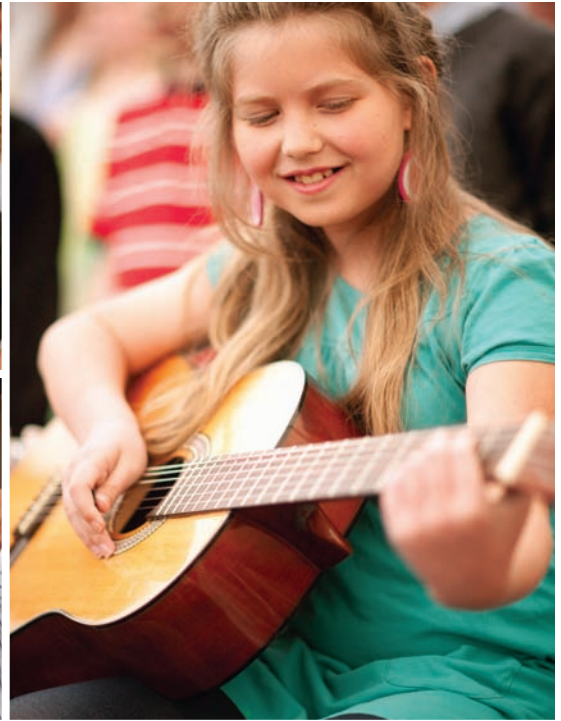
STRATEGIC ISSUE: HOW DO WE PREPARE FOR A LEADERSHIP TRANSITION AND INSTITUTIONALIZE BRIGITTE'S LEGACY?

Planning for the first-ever change in leadership will be a pivotal and poignant process in the history of Bertschi School. We have been infused with Brigitte's passion and vision for a school where children discover the joy and challenges of learning in an environment that is inclusive, community-centered, and compassionate. Now we begin to support her transition with gratitude and confidence that her work will continue under new leadership. As part of that effort, Bertschi's Board is reaffirming the school's commitment to its mission and values and developing milestones by which to guide the school through a change in leadership. In addition, Bertschi aims to foster and strengthen the school's relationship within the neighborhood and the larger Capitol Hill community.

ACCOMPLISHMENTS

- Achieved re-accreditation from the Pacific Northwest Association of Independent Schools, including commendations for Brigitte's leadership and her partnership with the Board, who fully embrace the school's mission. The report also acclaimed the alignment of the educational program with the school's mission and philosophy.
- Developed and implemented a communication plan for neighborhood outreach to facilitate and enhance the school's connections with the community.
- Engaged the Board of Trustees in professional development focused on governance best practices and key issues facing independent schools, including financial challenges and enrollment management.
- Created more opportunities for interaction with the community by leading tours of the school's LEED Gold-certified Bertschi Center, opening the school's gymnasium to a community basketball team, hosting a PNAIS sustainability conference, and holding parent education events.

future



STRATEGIC ISSUE: HOW WILL WE ACHIEVE NEW LEVELS OF FINANCIAL SUSTAINABILITY UNDER CURRENT FINANCIAL CONSTRAINTS AND FUTURE TRENDS?

To offer children its extraordinary educational program, Bertschi must hire and retain quality teachers, enroll children from a range of socio-economic backgrounds, and provide an optimal learning environment. At the same time, the school must respond to a changing economic landscape and allocate its limited resources even more prudently than before. Bertschi is challenged to carefully direct its recruitment, enrollment and financial aid programs, explore alternative revenue sources, cautiously manage its use of debt, and optimize operating efficiency. A strong mix of revenue sources and financial contributions is essential to ensuring the school's financial sustainability.

ACCOMPLISHMENTS

- Completed the Campus Master Plan with the construction of the Bertschi Center, renovation of the Library, creation of the Drama Lab, and addition of the Living Building Science Wing.
- Increased financial aid allocation to 12% of the operating budget to ensure affordability and access for families regardless of their ability to pay, resulting in support for 16% of Bertschi's students.
- Developed a long-term financial plan that supports the exceptional education program while also ensuring financial sustainability.
- Increased fund raising for both annual and major gifts, including a focus on building the endowment to provide financial stability and flexibility in the future.
- Reorganized the administrative team by creating separate Director of Admission and Director of Advancement positions to maximize efficiency and clarify responsibilities.



mission

STRATEGIC ISSUE: HOW DO WE DEFINE OUR NICHE IN THE MARKETPLACE?

To identify Bertschi's niche in the elementary school marketplace, we need to understand and articulate what families value about the school and its educational program. Revising the mission statement and setting forth our core values established a common language for the community and a foundation for sharing a student's unique experience with prospective families. As the independent school market becomes increasingly competitive and complex, it is critical for us to understand who our key audiences are and how we can most effectively communicate Bertschi's mission and values.

ACCOMPLISHMENTS

- Based on an extensive marketing survey, introduced a new admission view book and redesigned website, highlighting Bertschi's mission and focusing on the value of the educational program.
- With the purchase of the Hooper House, realized the long-term goal of reinstating Bertschi's pre-kindergarten program, creating another primary entry-point for prospective families.
- Developed and implemented communication tools to personalize the admission process and take full advantage of individualized marketing strategies.
- Achieved full enrollment with largest number of students in the school's history.
- Broadened community composition to include 33% of students from ethnically and racially diverse backgrounds.



STRATEGIC ISSUE: HOW DO WE DEVELOP A CULTURE OF GIVING THAT INCLUDES ALL FAMILIES AND APPROPRIATELY SUPPORTS THE SCHOOL?

The Bertschi community is the core of who we are, what we do, and why we do it. We believe that giving gifts of time, talent, and financial resources is an integral part of this community and is philosophically embraced by all families. We recognize that financial sustainability and fund raising success are inextricably linked, and that the extraordinary learning experience Bertschi offers to children is deserving of financial support. Bertschi aims to strengthen its connection to current families as well as the extended community.

ACCOMPLISHMENTS

- Expanded community engagement through parent education speakers, school-wide events such as the “All-School Skate” and “Ride Around Greenlake,” and affinity groups.
- Increased Annual Fund participation throughout the community, particularly from alumni families and grandparents.
- Broadened alumni involvement in the school, including Board representation, high school senior reunions, and social media presence.
- Continued to integrate opportunities for education and discussion around issues of diversity, including an all-school reading of *Brendan Buckley’s Universe and Everything in It* and visit from the author, Sunde Frazier.
- Successfully completed the **Make Room for Bertschi** and **Bringing Stories to Life** campaigns, which cumulatively raised nearly \$4.2 million from generous donors.
- Launched **Believe in Bertschi**, a four-year strategic fund raising initiative, to fund construction of the Living Building Science Wing and increase the school’s endowment, ensuring the school’s financial sustainability into the future.



 **BERTSCHI SCHOOL**

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Seattle, Washington 98102

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This Annual report is a production of the Bertschi School Advancement Office.

TIFFANY CAREY
DIRECTOR OF ADVANCEMENT

PHOTOGRAPHY BY JIM GARNER AND TONY OBER

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Each year I am moved by the many ways in which the Bertschi community demonstrates its commitment to the school. This year was no exception, and the generous gifts of time, talent and money were truly inspiring. Every contribution—driving on a field trip, serving on the Parent Council, or making a pledge to the Annual Fund—is deeply valued.

While traditionally we take time to reflect on the accomplishments of the past year, the Board of Trustees is purposefully looking ahead. In planning for Bertschi's future the Board is embarking on an ambitious fundraising initiative, **Believe in Bertschi**. Completing the campus master plan and growing the school's endowment over the next three years will ensure the school is financially strong and well-positioned for a transition in leadership.

On behalf of our students, faculty and staff, please accept my heartfelt thanks for your continued support of Bertschi School.

Brigitte Bertschi
FOUNDER AND HEAD OF SCHOOL

2009-2010 Financial Report



YEAR END RESULTS JUNE 30, 2010 (UNAUDITED)

OPERATING REVENUES

Tuition & Fees	\$ 4,765,689
Investment & Other Income	56,734
	\$ 4,822,423

OPERATING EXPENSE

Instructional Program	\$ 2,355,799
General & Administrative Expenses	1,295,164
Financial Aid	500,003
Facility Expense & Capital Projects	608,280
Financing Costs	93,896
Board Designated Transfers	371,084
	\$ 5,224,226

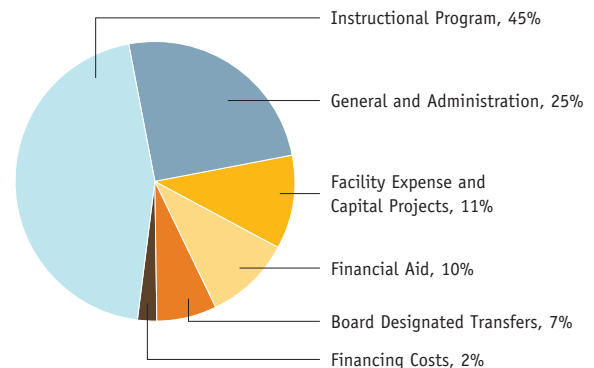
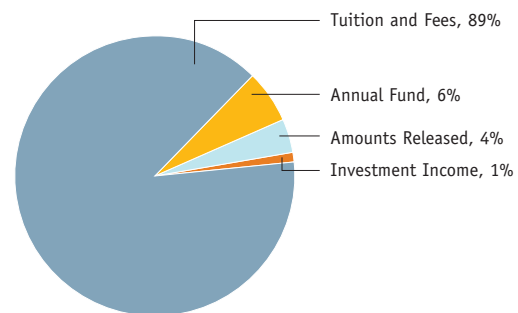
DEFICIT FROM OPERATIONS

\$ (401,803)

(The deficit from operations was \$1,762 per student)

FUNDRAISING REVENUES

Annual Fund	\$ 309,344
Amounts Released From Restrictions & Designations	231,975
	\$ 541,319



(The average Annual Fund gift from current families was \$1,611.)



This Annual Report acknowledges all cash gifts and pledges between July 1, 2009 and June 30, 2010. Every effort has been made to have a complete and accurate listing. If you believe there has been an error or omission, please contact the Advancement Office at 206-442-6852.

www.bertschi.org

“We’re committed to giving back to Bertschi because we’re so thankful that the school provides an environment that’s representative of what we aspire to for our children, and our world at large; an environment based on respect, accountability, a learning mindset, and environmental sustainability.”

HEATHER AND MATT POPE