
Strategic Plan for Waldorf School of San Diego



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Introduction

Waldorf School of San Diego has engaged in a strategic planning process as part of its preparation for a capital campaign for the development of a High School, the redevelopment of the Lower School and an upgrade to the school's curb appeal and grounds.

The Strategic Plan takes into account three to five (3-5) year Goals, the Strategies that support the goals and one (1) year of Objectives (specific action items) that affect the Strategies and have measurable outcomes.

The Plan is a living document that should be reviewed at monthly Board meetings, and checked against the due dates and deliverable items that have been set down.

The Plan is meant to be shared with the School community and may be posted to the School's website, so that progress in the Objectives and Strategies can be viewed in real time.

The Strategic Plan, including an Environmental Scan is also meant to be renewed and rewritten once a year by a group of representatives from the Board, Pedagogical Group, Administration and High School, with a year of new Objectives.

Materials in Detail

Materials that provide detail to Goals and Objectives in the Strategic Plan include the School's Master Campus Development Plan, the School's written policy on conflict resolution, and existing Faculty, Staff and Parent guidelines and handbooks.

Strategic Goals for 2006 Through 2009

2008/2009 Objectives

Goal 1: To become a fully developed, accredited and nationally recognized Waldorf School that serves the children of the San Diego region from Early Childhood through High School.

Strategies for a Unified K-12: Expand and develop the School's pedagogical, curriculum and administration functions to effectively serve and support a fully developed K-12 Waldorf School.

Objectives for Goal 1 in 2008/2009:

1. ◆ Pedagogy ◆

- ❖ **1.1** Identify specific new responsibilities related to leading the new High School for a) the Pedagogical Group, b) the full Faculty circle and c) the High School Faculty circle by **September 2008**.
 - **Responsible:** WSSD Pedagogical Group, Faculty circle, and High School Faculty with mentoring from Betty Staley

- ❖ **1.2** Begin the self-study process of AWSNA accreditation as outlined by AWSNA by **September 2008**.
 - **Responsible:** WSSD Pedagogical Group, Faculty circle, and High School Faculty with mentoring from Betty Staley

- ❖ **1.3** Begin the process of creating unified K-12 curriculum plans in the areas of Movement/Athletics, Sciences/Math, Humanities, the Arts, and other subject areas by **December 2008**.
 - **Responsible:** WSSD Pedagogical Group and full Faculty circle, with mentoring from Betty Staley.

- ❖ **1.4** Provide materials and training to Faculty and Administration on how to represent the unified K-12 curriculum to parents by **December 2008**.
 - **Responsible:** WSSD Pedagogical Group, full Faculty circle and Administration with mentoring from Betty Staley.

2. ◆ Administration ◆

- ❖ **2.1** Identify specific administrative responsibilities related to the new High School and assign those responsibilities to individual staff members by **September 2008**.
 - **Responsible:** WSSD Administration with mentoring from Kay Hoffman.

3. ◆ Board ◆

- ❖ **3.1** Create a 3-5 year budget plan for financially supporting the unified K-12 School **September 2008**.
 - **Responsible:** WSSD Board with mentoring from Betty Staley and Kay Hoffman.

Strategies for Development: Define the role of Faculty in Development. Add two department staff and create a Development Committee. Manage the Annual and Capital campaigns to their best potential.

Objectives for Goal 1 in 2008/2009:

1. ◆ Faculty Roles in Development ◆

- ❖ **1.1** Align Faculty members in support and understanding of the Development program by **May 2008**.
 - **Responsible:** Director of Development

- ❖ **1.2** Have Faculty help identify those class families that have potential to make a major donation to the School by **April 2008**.
 - **Responsible:** Director of Development
- ❖ **1.3** Secure Faculty gifts and pledges prior to meeting with the School families by **February 2008. Completed**
 - **Responsible:** Director of Development
- ❖ **1.4** Identify one Faculty member to join the Development Committee by **April 2008**.
 - **Responsible:** Director of Development
- ❖ **1.5** Identify and train two to three Faculty members who could accompany the Director of Development and/or parent volunteers on personal meetings regarding Annual Giving by **April 2008**.
 - **Responsible:** Director of Development

2. ◆ Add Development Staff ◆

- ❖ **2.1** Begin to expand the Development Department in preparation for the Capital Campaign by **August 2008** for hourly staff and by **November 2008** for campaign support.
 - **Responsible:** Director of Development, with approval by the Board

3. ◆ Manage the Annual Campaign (AG) ◆

- ❖ **3.1** Expand the circle of volunteers who can make Annual Giving visits, and provide training by **April 2008**.
 - **Responsible:** Director of Development
- ❖ **3.2** For fiscal year 2008-2009, assure that the Annual Giving campaign begins with planning for the direct mail appeal by **July 2008** and appeal drop by **October 2008**.
 - **Responsible:** Director of Development
- ❖ **3.3** Meet with second tier of potential major donors for conversations about the Development program and their support of it by **August-**

September 2008.

➤ **Responsible:** Director of Development

❖ **3.4** Schedule a phone-a-thon to solicit gifts to Annual Giving prior to the fiscal year end (July 31st) by **April -May 2008.**

➤ **Responsible:** Director of Development, volunteers

4. ◆ Manage the Capital Campaign ◆

❖ **4.1** Outline the necessary steps and committees to develop the School's long-term capital needs by **April -May 2008.**

➤ **Responsible:** Director of Development

❖ **4.2** In conjunction with counsel, prepare for a feasibility study by **June-August 2008.**

➤ **Responsible:** Director of Development, Board

❖ **4.3** Develop the necessary materials for the case statement and scope of work for the feasibility study by **July-September 2008.**

➤ **Responsible:** Director of Development, Capital Campaign planning committee, Counsel

5. ◆ Create a Development Committee ◆

❖ **5.1** Create a group that has representatives from Faculty, Annual Giving, all events and Alumni members who can have an overview of the entire Development program and its direction **ongoing from January 2008.**

➤ **Responsible:** Director of Development

6. ◆ Manage Development Communications ◆

❖ **6.1** Inform parents, Faculty, Board and extended community about Development communications in a timely and clear manner **ongoing for 2008-2009.**

➤ **Responsible:** Director of Development

Strategies for Managing Growth: Address the organizational

changes created by the construction and the addition of the High School. Increase the focus on external conditions that affect the School. Prepare contingency plans for emerging situations as needed, including leadership, messaging and alternatives.

Objectives for Goal 1 in 2008/2009:

1. ◆ Address Organizational Changes ◆

- ❖ **1.1** Form a Board Governance Committee tasked with revising the structure of the Board and clarifying the authority and communication between the Board and the School by **April 2008**.
 - **Responsible:** Board of Trustees

 - ❖ **1.2** Clarify the responsibilities among the Treasurer, Business Manager, Finance Committee and Board, as well as other relationships within the School by **August 2008**.
 - **Responsible:** Governance Committee

 - ❖ **1.3** Create a 3-year space allocation plan that incorporates the needs of Administration, Grades, special subjects and all other uses of the School by **July 2008**.
 - **Responsible:** Facilities Manager, Admissions Director, Faculty member

 - ❖ **1.4** Review the flow and availability of campus parking. Create a parking plan and assignments as needed, by **August 2008**.
 - **Responsible:** Administrator and Facilities Manager
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Strategies for Communication: Institutionalize the communication plan for the School. Develop parent training about Waldorf education and manage their expectations. Continue to develop the protocol of social inclusion.

Objectives for Goal 1 in 2008/2009:

1. ◆ Institutionalize the Communication Plan ◆

- ❖ 1.1 Create an organizational chart illustrating Faculty, Administration and Board membership and operation by **September 2008**.
 - **Responsible:** Administration

- ❖ 1.2 Create and implement a one hour *Room Parent Training* by **September 2008**.
 - **Responsible:** Parent Association and Communication Group

2. ◆ Develop Parent Training ◆

- ❖ 2.1 Host a *New Family Welcoming Dinner* to introduce new families to the School by **August 2008**.
 - **Responsible:** Parent Association and Administration

- ❖ 2.2 Institute a *New Family Orientation* within the first two weeks of School to inform new parents about the School by **September 2008**.
 - **Responsible:** Parent Association and Administration

- ❖ 2.3 Institute an introductory segment at the first Class Meeting of the year to inform new parents about School and Faculty expectations by **September 2008**.
 - **Responsible:** Faculty

- ❖ 2.4 Recommend that the School include *Class Meeting Attendance* on the yearly Student Reports by **September 2008**.
 - **Responsible:** Parent Association and Administration

3. ◆ Manage Parent Expectations ◆

- ❖ 3.1 Detail the campus expansion plans to parents in a formal letter and prospectus, and provide a forum for response by **September 2008**
 - **Responsible:** Faculty, Administration and Board

- ❖ **3.2** Provide campus expansion updates in “This Week at Waldorf”:
Ongoing
 - **Responsible:** Building Committee

- ❖ **3.3** Advise parents of significant planned changes affecting Early Childhood Education or Lower School, via formal letter: **Ongoing**
 - **Responsible:** Faculty, Administration and Board

- ❖ **3.4** Keep all parents apprised of High School activities by including the High School newsletter with “This Week at Waldorf”: **Ongoing**
 - **Responsible:** Faculty, Administration and Board

4. ◆ **Develop Social Inclusion** ◆

- ❖ **4.1** Continue the 3-year plan of Social Inclusion work: **Ongoing**
 - **Responsible:** Faculty, Administration and Board, Kim John Payne

- ❖ **4.2** Schedule workshops and lectures for parents to share the Social Inclusion work, and publish updates in the School newsletter: **Ongoing**
 - **Responsible:** Social Inclusion Group

Goal 2: To redevelop the campus dynamically so as to offer the full Waldorf curriculum in an inspired setting.

Strategies for Building: Redevelop our existing campus, creating and completing an overall campus plan that most directly benefits our children and serves our curriculum. Create a High School campus that most successfully ensures the anthroposophical, financial, academic and social success of the new school. Increase the curb appeal of the School.

Objectives for Goal 2 in 2008/2009:

1. ◆ Campus Development ◆

- ❖ **1.1** Finalize the conditional use permit application and approval by **September 2008**.
 - **Responsible:** Building Committee

- ❖ **1.2** Identify a 2-3 year transitional site for the High School and outline steps with the city for occupying that space by **April 2008**.
 - **Responsible:** Building Committee

- ❖ **1.3** Complete steps of transitional location development by **August 2008**.
 - **Responsible:** Building Committee

- ❖ **1.4** Move campus expansion and redevelopment forward: **Ongoing**.
 - **Responsible:** Building Committee

The Environmental Scan: A View to the School

The Environmental Scan was developed out of the Strategic Planning Workshop in October 2006 and was updated in the Strategic Planning Workshop in January 2008. The Workshop group consisted of individuals who represented the different constituencies of the School's community, including Parents, Faculty, Administration, Building Committee, Lower School and High School. Points called out in the Scan are representative of stakeholder perceptions.

Environmental Scan 2008

Strengths	Weaknesses
<ul style="list-style-type: none"> ❖ Something the world needs ❖ Integrity of Waldorf classes ❖ Awareness of children ❖ Embrace the future ❖ A school site ❖ A parent-led community ❖ Good education ❖ Level of caring ❖ High level of community involvement ❖ A good foundation ❖ Our community/our teachers ❖ Tony as Development Director ❖ Social inclusion process ❖ Retaining quality teachers ❖ Full enrollment ❖ Student retention ❖ Improving location 	<ul style="list-style-type: none"> ❖ Financial awareness ❖ Not enough resources ❖ Community confidence ❖ Management of change ❖ Classroom space
Opportunities	Threats
<ul style="list-style-type: none"> ❖ Self-knowledge ❖ Clean house ❖ Expanding Waldorf awareness ❖ A wealthy county ❖ To take care of each other ❖ Financial awareness ❖ Family/teacher retention ❖ Working relationships with the City and neighborhood 	<ul style="list-style-type: none"> ❖ Communication follow through ❖ Gossip ❖ Esprit de corps ❖ Egos over priorities ❖ High School impact on Lower School economy ❖ Permit process ❖ CUP approval ❖ Full enrollment and income increases

2007/2007 and 2007/2008

1. Strategies for Accreditation: Complete the accreditation process with the Association of Waldorf School in North America (AWSNA) and the Western Association of Schools and Colleges (WASC). Receive recognition from the University of California certifying that the Upper School meets the university entrance requirements. Research and consider undertaking accreditation for the California Association of Independent Schools (CAIS).

Objectives for Goal 1 in 2006/2007: Completed

1. ◆ Accreditation ◆

- ❖ **1.1** Based on the consensus of the Faculty, Board and Administration, complete a first draft of the AWSNA application by **January 2007**.
 - **Responsible:** Faculty Representative Tatiana Dimitrova and Business Manager Sandy Derniat with assistance from the Director of High School Development Nathan Wilcox, Faculty, Administration and Board of Trustees
- ❖ **1.2** Based on the **timeline set by AWSNA in January 2007**, complete all necessary follow up tasks.
 - **Responsible:** Faculty Representative Tatiana Dimitrova and Business Manager Sandy Derniat with assistance from the Director of High School Development Nathan Wilcox, Faculty, Administration and Board of Trustees
- ❖ **1.3** Identify a responsible party for the process of WASC accreditation by **March 2007**.
 - **Responsible:** Board of Trustees, Administration and Pedagogical Group

~~❖ 1.4 Assign an individual to research the accreditation process for CAIS by March 2007.~~

~~➤ **Responsible:** Board of Trustees, Administration and Pedagogical Group~~

~~❖ 1.5 Report and make a recommendation regarding CAIS accreditation by June 2007.~~

~~➤ **Responsible:** Individual identified in (1.4)~~

❖ 1.6 Based on direct research, develop a timeline for WASC accreditation by September 2007.

➤ **Responsible:** Individual identified in (1.3)

Objectives for Goal 1 in 2007/2008: **Completed**

❖ 1.1A Complete the Upper School curriculum based on the indications of Rudolf Steiner and demonstrate that the curriculum meets all University of California entrance requirements by **December 2008**.

➤ **Responsible:** Director of High School Development Nathan Wilcox and Upper School Lead Teacher

2. Strategies for Curriculum/Pedagogy: Retain our outstanding teachers and to attract the very best and most qualified lower and upper school Faculty. Increase the support and mentoring that our teachers receive. Increase our Faculty's benefits, salaries and retirement plans to a level that meets or exceeds community standards. Provide stronger education and support to our parent body. Achieve desired enrollment in each classroom. Create an Upper School at WSSD.

Objectives for Goal 1 in 2006/2007: **Completed**

2. ◆ Curriculum/Pedagogy ◆

❖ 2.1 Identify an individual to develop a plan for teacher hours and

resources to support teacher candidate recruitment by **January 2007**.

➤ **Responsible:** Board of Trustees and Pedagogical Group

❖ **2.2** Designate increased teacher hours for recruitment and develop resources for increased financial, informational and social support for candidates by **January 2007**.

➤ **Responsible:** Individual identified in (2.1)

❖ **2.2** Create a long-term plan that will significantly raise the base pay and benefit levels for all teachers, administrative staff and positions of school leadership, and will significantly raise the pay in each professional area by **June 2007**.

➤ **Responsible:** Board of Trustees **Open**

❖ **2.3** Identify an individual to develop a teacher recruitment manual, by **June 2007**.

➤ **Responsible:** Board of Trustees and Pedagogical Group

❖ **2.4** Develop a teacher recruitment manual with clear guidelines and timelines, by **September 2007**.

➤ **Responsible:** Individual identified in (2.3)

Objectives for Goal 1 in 2007/2008: **Completed**

❖ **2.1A** Employ a full-time dedicated enrollment director, and identify an individual to develop classroom assistant policy by **December 2007**.

➤ **Responsible:** Pedagogical Group, Board of Trustees and Administration

❖ **2.2A** Develop a classroom assistant policy, including allocation of hours and present to the Pedagogical Group, Board of Trustees and Administration to be formalized by **December 2007**. **Open – by September 2008**

➤ **Responsible:** Individual identified in (2.1A).

❖ **2.3A** Assign a team to evaluate the School's conflict resolution and

communications procedures, and propose a system for implementation by **September 2007**.

- **Responsible:** Pedagogical Group, Board of Trustees, Parent Association and Administration

❖ **2.4A** Evaluate the school's conflict resolution and communications procedures, and develop a protocol to re-implement the procedures and educate all School members about those processes, thereby coordinating the responses to conflict and parent input with an open and time-oriented method by **December 2007**.

- **Responsible:** Team identified in (2.3A)

❖ **2.5A** Complete the steps of Upper School development laid out in the Master Plan of Upper School Development by **September 2008**. **Open**

- **Responsible:** High School Initiative and Board of Trustees with support from the Pedagogical Group

❖ **2.6A** Create an endowment or other long-term investment for the purpose of strategies selected by **FY2007-2008**. **Open – by FY 2009-2010**

- **Responsible:** Board of Trustees Committee

❖ **2.7A** Identify a team to create a formal sabbatical program for teachers, and implement the sabbatical program by **FY2007-2008**.

- **Responsible:** Board of Trustees and Pedagogical Group

❖ **2.8A** Create a formal sabbatical program for teachers by **FY2007-2008**.

- **Responsible:** Team identified in (2.7A).

❖ **2.9A** Increase the support and mentoring available to teachers by identifying a team to develop protocols for classroom assistant hours, Faculty coordination and the mentoring program, substitute teachers and a substitution policy, and administrative assistance for Faculty and by **hiring an extra-lesson specialist** by **FY2007-2008**. **Open – by FY 2008-2009**

- **Responsible:** Pedagogical Group and Board of Trustees

❖ **2.10A** Recommend classroom assistant hours, identify a Faculty

coordinator and assign significant hours for the mentoring program, develop a strong pool of substitute teachers and a clear substitution policy, identify and recommend the administrative assistance needed for Faculty with administrative roles by **FY2007-2008**.

➤ **Responsible:** Team identified in (2.9A)

❖ **2.11A** Provide stronger education and support to the parent body by identifying a team to develop: budget guidelines for volunteer leaders, enriched parent

❖ sessions, increased teacher support for parent meetings, an expanded parent gathering area and an improved parking plan, by **FY2007-2008**.

➤ **Responsible:** Pedagogical Group, Board of Trustees and Parent Association

❖ **2.12A** Create budgetary guidelines and reimbursement plans for all volunteer leaders, create additional parent programs featuring outside Waldorf and Anthroposophical professionals for parent sessions, increase the level of direct support that teachers receive for parent meetings, expand the parent gathering area and improve the parking plan by **FY2007-2008**.

➤ **Responsible:** Team identified in (2.11A)

❖ **2.13A** Identify a team to expand outreach to parents, grandparents, and other family members, by **FY2007-2008**.

➤ **Responsible:** Pedagogical Group, Board of Trustees and Parent Association

❖ **2.14A** Develop outreach protocols including mailings, a speakers bureau, a Parent lending library, store items and an expanded This Week @ Waldorf by **FY 2007-2008**.

➤ **Responsible:** Team identified in (2.13A)

❖ **2.15A** Engage students in curriculum-related community service in surrounding neighborhoods and the greater San Diego community by **September 2007**.

➤ **Responsible:** Pedagogical Group

3. Strategies for Operations/Development: Increase operating funds, including participation in/gifting to the Annual Giving Campaign. Fund the Master Building Plan. Improve communication within the WSSD community and increase family retention. Increase the school's visibility in the greater San Diego community so as to increase enrollment.

Objectives for Goal 1 in 2006/2007: Completed

❖ **3.1** Continue to create and maintain a balanced budget for the school, by **June 2007**.

➤ **Responsible:** Board of Trustees

❖ **3.2** Conduct an independent development audit and **feasibility study**, and retain the independent consultant for advice and assistance, by **December 2007**.

Open – by December 2008

➤ **Responsible:** Board of Trustees, Building Committee

❖ **3.3** Cultivate and conduct Annual personal solicitations with 25% - 50% of potential major donors, parents, grandparents and friends within the WSSD community, by **December 2007**.

➤ **Responsible:** Director of Development Director of Development, and Director of Admissions Julie Joinson

❖ **3.4** Examine, redefine and promote the roles in Administration to increase the effective daily management of the school, by **September 2007**. **Open – by December 2008**

➤ **Responsible:** Kris Bradley

❖ **3.5** Host monthly or quarterly “teas” where representatives from Board, Administration and/or the Faculty are available to answer questions and discuss topical issues at the School, and conduct written surveys twice a year in January and May, by **January 2007**.

➤ **Responsible:** Administration

❖ **3.6** Review and strengthen the Exit Interview procedure, follow up on actionable items, by **December 2006**.

- **Responsible:** Administrator and Pedagogical Group
- **Status:** Implemented

❖ **3.7** Broaden the WSSD advertising plan to include five (5) new print ads, an improved website and a minimum of one joint advertising or promotion effort with another Waldorf School, by **September 2007**.

- **Responsible:** Director of Admissions Julie Joinson

❖ **3.8** Expand the WSSD community outreach program to attract Upper Grades and High School families while maintaining our outreach programs to maintain enrollment in the Lower School, through the engagement of Morning Glory volunteers, conducting up to ten (10) presentations, development of a program for community notification, increasing attendance at current outreach events, participation in four (4) or more public outreach events, community displays of student work, inviting community and civic leaders to four (4) or more school events by **September 2007. Open – by December 2008**

- **Responsible:** Director of Admissions Julie Joinson

❖ **3.9** Research the benefit of adding a Board member who is a member of, and active in the greater San Diego community by **September 2007. Open – by December 2008**

- **Responsible:** Board of Trustees

Objectives for Goal 1 in 2007/2008: **Completed**

❖ **3.1A** Cultivate and conduct Annual personal solicitations with 100% of potential major donors, parents, grandparents and friends within the WSSD community, by **December 2008**.

- **Responsible:** Director of Development

❖ **3.2A** Continue to develop the Annual Giving Campaign protocol through annual planning, including development of a needs statement, development of grantwriting protocol, personal Annual solicitations with potential major donors and all new families, continued 100% participation of Faculty, staff and Board, the use of key Campaign volunteers, and research into the successful fundraising methods of other

Waldorf schools, by **September 2008**.

➤ **Responsible:** Director of Development

❖ **3.3A** Develop a single capital campaign plan for K-12 that addresses campaign phases in a manner that balances high priority needs versus wants, by **September 2008**.

➤ **Responsible:** Director of Development

❖ **3.4A** Cultivate relationships with ten (10) potential donors to the capital campaign who are outside the immediate WSSD community, including individuals, corporations and foundations, by **September 2008**.

➤ **Responsible:** Director of Development

❖ **3.5A** Identify an individual(s) to coordinate events and publicity, and to upgrade school materials by **FY 2007-2008**. **Open – by September 2008**

➤ **Responsible:** Pedagogical Group, Administration and Board of Trustees

❖ **3.6A** Create an effective system for event scheduling and publicity, evaluate and heighten the professionalism of the school's written information and collateral materials by **FY 2007-2008**. **Open – by December 2008**

➤ **Responsible:** Individual(s) identified in (3.5A).

Strategies for Building: Redevelop our existing campus, creating and completing an overall campus plan that most directly benefits our children and serves our curriculum. Create a High School campus that most successfully ensures the anthroposophical, financial, academic and social success of the new school. Increase the curb appeal of the School.

Objectives for Goal 2 ♦ Building Committee ♦ in 2006/2007:

Completed

❖ **1.1** Develop and finalize a plan for the redevelopment of the Lower School, including classrooms, kitchens, bathrooms, an extra lesson room,

~~library, aftercare room, recovery room, conference room, administrative space and storage areas, by **June 2007.**~~

~~➤ **Responsible:** Building Committee, Board of Trustees and Bert Chase, with input from the Faculty~~

❖ **1.2** Begin redevelopment Phase 1, **between June 2007 and December 2007. Open – between June 2009 and June 2010**

➤ **Responsible:** Building Committee and Bert Chase

❖ **1.3** Develop and finalize a redevelopment plan to increase the school's curb appeal by positively reorienting parking increasing the use of professionals and specialists for landscaping, lighting, signage and related tasks and achieving a balance between green space and building space on the extended campus, by **June 2007.**

➤ **Responsible:** Building Committee and Bert Chase

Objectives for Goal 2 ◆ Building Committee ◆ in 2007/2008:

Completed

❖ **1.1A** Develop and finalize a plan for the Upper School campus, including classrooms, outdoor performing space, space for orchestra, band and eurythmy, art studio, library, technical instruction area, Faculty lounge, bathrooms, student common area, gym, locker space, private meeting room and Faculty preparation area, by **January 2008.**

➤ **Responsible:** Building Committee and Bert Chase

