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## **Strategic Plan for The Waldorf School of San Diego**

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## Introduction

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The 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 as we progress.

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.

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## 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.

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## Strategic Goals for 2006 Through 2009

### 2006/2007 Objectives

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**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.

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**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).

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### Objectives for Goal 1 in 2006/2007:

#### 1. v Accreditation v

- ▶ **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 of 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)
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## **Objectives for Goal 1 in 2007/2008:**

- ▶ **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
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**2. Strategies for Curriculum/Pedagogy:** Retain our outstanding teachers and attract the 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 parent programs 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:

### 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
  
  - ▶ **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)
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## Objectives for Goal 1 in 2007/2008:

- ▶ **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**.
  - **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**.
  - **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**.
  - **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**.
  - **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.

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## Objectives for Goal 1 in 2006/2007:

### 3. ∪ Operations/Development ∪

- ▶ **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**.
  - **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 Tony Cirone, and Director of Admissions Julie Joinson
  
- ▶ **3.4** Examine, redefine and promote the role of the Administrator to increase the effective daily management of the school, by **September 2007**.
  - **Responsible:** Board of Trustees and Consultant
  
- ▶ **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 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**.
  - **Responsible:** Director of Admissions Julie Joinson
  
- ▶ **3.9** **Research the benefit of adding** up to three (3) Board members who are members of, and active in the greater San Diego community by **September 2007**.
  - **Responsible:** Board of Trustees



## Objectives for Goal 1 in 2007/2008:

- ▶ **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 Tony Cirone and Director of Admissions Julie Joinson
  
- ▶ **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, Tony Cirone
  
- ▶ **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, Tony Cirone
  
- ▶ **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, Tony Cirone
  
- ▶ **3.5A** Identify an individual(s) to coordinate events and publicity, and to upgrade school materials by **FY 2007-2008**.
  - **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**.
  - **Responsible:** Individual(s) identified in (3.5A).



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

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**1. 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.

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### **Objectives for Goal 1 ∪ Building Committee ∪ in 2006/2007:**

- ▶ **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**.
    - **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
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## **Objectives for Goal 1 ∪ Building Committee ∪ in 2007/2008:**

- ▶ **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
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## **The Environmental Scan: A View to the School**

**The Environmental Scan was developed out of the Strategic Planning Workshop in October 2006. 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 2006

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Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▶ Something the world needs</li> <li>▶ Integrity of Waldorf classes</li> <li>▶ Awareness of children</li> <li>▶ Embrace the future</li> <li>▶ A school site</li> <li>▶ A parent-led community</li> <li>▶ Good education</li> <li>▶ Level of caring</li> <li>▶ High level of community involvement</li> <li>▶ A good foundation</li> <li>▶ Our community/our teachers</li> </ul>	<ul style="list-style-type: none"> <li>▶ Mutual goals</li> <li>▶ Consensus</li> <li>▶ Financial awareness</li> <li>▶ Not enough resources</li> <li>▶ Location</li> <li>▶ Community confidence</li> <li>▶ Internal resistance</li> <li>▶ Moving too fast</li> <li>▶ Management of change</li> <li>▶ Internal issues</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>▶ Become a model school</li> <li>▶ Add a High School</li> <li>▶ Self-knowledge</li> <li>▶ Clean house</li> <li>▶ Expanding Waldorf awareness</li> <li>▶ A wealthy county</li> <li>▶ To take care of each other</li> <li>▶ Financial awareness</li> <li>▶ Family/teacher retention</li> </ul>	<ul style="list-style-type: none"> <li>▶ To not do what needs to be done</li> <li>▶ Communication follow through</li> <li>▶ Camaraderie</li> <li>▶ Gossip</li> <li>▶ Esprit de corps</li> <li>▶ Egos over priorities</li> </ul>