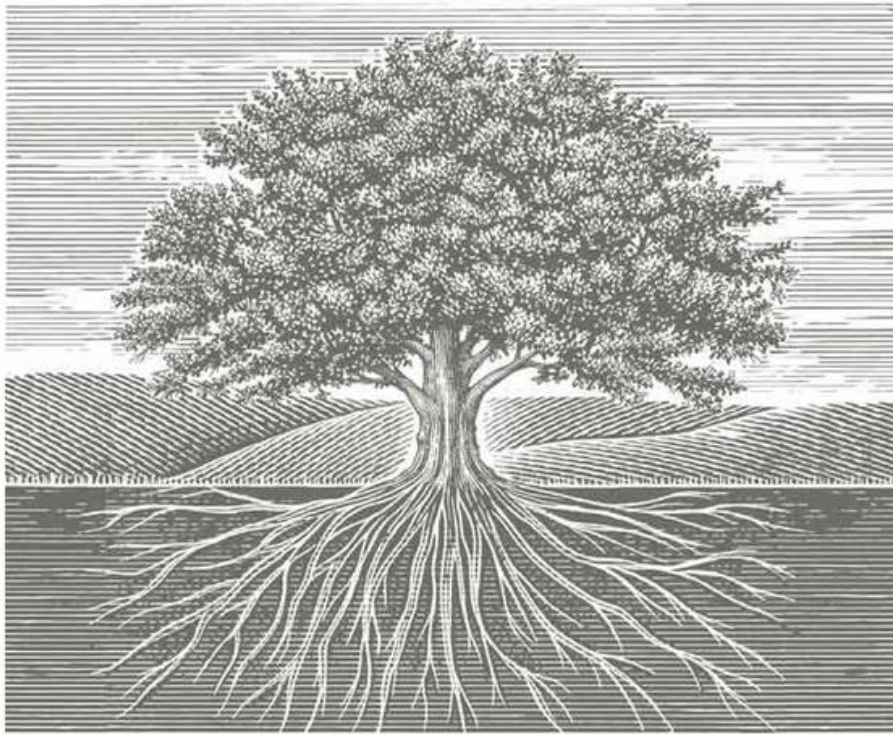


# **CEDAR SPRINGS WALDORF SCHOOL**

## **STRATEGIC PLAN 2019**



## **INTRODUCTION:**

*“You cannot step twice into the same river, for other waters are continually flowing on.” - Heraclitus*

Like living organisms, institutions go through a defined lifecycle. There is birth, followed by periods of growth, adolescence, and maturity. In 2019, Cedar Springs Waldorf School celebrates its thirtieth year of educating children in Placerville, California. From its grassroots beginnings to the present time, the school has undergone a remarkable story of development. What began as a pioneering idea, blossomed forth into a significant and enthusiastic community, all committed to the education of the whole child.

One of the most compelling insights in Waldorf education, is the idea that a child passes through distinct phases of development. The curriculum corresponds to the needs of the child at a given stage. In similar fashion, the school itself has progressed. There was conception, followed by a period of rapid growth and then an eventual leveling off. The organization has now reached the stage of adolescence, straddling the period between youth and maturity. Like any young person, we are now asking questions about identity, wondering how to proceed, and where our future development may take us.

It is here where we find ourselves: a youth in wandering, unable to go back and yet facing a future with both trepidation and hopefulness. What has guided us in childhood may no longer serve us in the same manner. There're the inevitable pitfalls and obstacles to be overcome, but further responsibility and reward seems tantalizingly close. Our experience over the years has brought wisdom and new insights; how will our collective knowledge benefit our next stage of development?

Life is not static. The environment and conditions around us change constantly. Some of the pioneering members of the community fall away, while many new people come to join us. We have grown in numbers, but we are also beholden to our financial and physical resources. Our site, for example, is only so big, our ability to accommodate growth is only so much. So there emerges the primacy of quality over quantity. Given our constraints, temporary or otherwise, how will we use our resources to best deliver on our educational mission? How can we prioritize and bring cohesion to our actions?

Strategic planning is an organizational tool for answering such questions.

## **VISION:**

*“Guided by care and respect for each human being, our vision is to provide a Waldorf education that nurtures and develops each child’s mind, body, and spirit through imagination, creativity, academic excellence, independent thinking and enthusiasm for life. We also encourage these qualities in the daily lives of our families to further inspire and support our students and ourselves. We aspire to develop thinking, caring individuals who will change the world through their thoughts, spoken words, and deeds.”*

Any discussion of strategy must necessarily begin with the vision. This is our *raison d’etre*, our animating purpose. It is the “why” behind our striving. Cedar Springs Waldorf School has and always will be focused upon the full and beneficial development of children. Everything we do in terms of pedagogy, community, and business operations supports the realization of this sacred ideal. Borne out of the vision is the mission statement and our values, a declaration of what we do and what we believe in.

## MISSION:

*“Inspiring our students to reach their highest potential as free-thinking, creative human beings who have a life-long love of learning, Cedar Springs offers Waldorf education to families and their children, infants through eighth grade.” -Cedar Springs Waldorf School Mission Statement*

## VALUES:

**Balanced Curriculum.** Integrated, exemplary academics through a balanced curriculum - We foster academic excellence and inquiry through our diverse, developmentally appropriate curriculum and our teachers’ passionate commitment to student engagement and success.

**Holistic Education.** Holistic, developmentally appropriate education -Through our understanding of Waldorf pedagogy, we strive to educate children academically, artistically and physically each day.

**The Whole Child.** The spiritual nature of each individual; the importance of nurturing positive values and character in our students -We recognize and nurture the spiritual essence of each individual through the curriculum content and by our community values. These values include compassion, respect, honesty, diligence, tolerance and kindness.

**Unique Potential.** The unique gifts of each individual - We respect the unique qualities, talents and skills of each child. Through a diverse educational experience, we inspire students to realize their unique potential.

**Reverence for Life.** Reverence for the environment and all life - We nurture awe, wonder and respect for the natural world and maintain a reverence for life in all its forms. We encourage the students to act on their love of the natural world by doing what they can to protect and improve their environment.

**Collaboration.** We strive to create a community in which families, staff and teachers work together to support the students’ and each other’s growth and learning. We are committed to communicating respectfully and openly.

**Service.** We believe in providing service to aid each other and our local and greater communities.

**Diversity.** We value the inclusion of families from diverse racial, ethnic, social, economic and spiritual

backgrounds.

**Consensus.** Decision-making by consensus - We build commitment for our decisions through full participation in deliberations and utilizing the wisdom of the group.

**Integrity and accountability.** We value fiscal, legal and social integrity and accountability in all our actions.

**Growth and Development.** We strive for and support growth and development organizationally, professionally and personally.

Our vision, mission and values are imbedded in and inform our strategic priorities—the major goals, or most important areas where we will focus our energy and resources in the coming years.

## STRATEGIC PRIORITIES:

### PRINCIPLE OF SUSTAINABILITY

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This phase in our school’s development leads us to a turn toward the future, and striving to ensure we will be able to bring Waldorf education to El Dorado county families for another thirty years. Sustainability is a principle that will overlap and embed itself in each of our strategic priorities, calling us to seek: a sound financial position that will help us weather downturns; foundationally strong facilities that enable us to provide our programs; and balanced and viable environments in which our community—students, faculty, parents and staff—can thrive.

### STRATEGIC PRIORITY ONE: WALDORF EDUCATION

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*“An anthroposophically-driven Waldorf education, dedicated to holistic, integrated learning.”*

We recognize anthroposophy as the guiding philosophy behind our pedagogy. We are an independent, AWSNA-accredited Waldorf school with a very solid, supportive faculty working from a deep interest and knowledge in the development of the child based on the principles of anthroposophy and the pedagogical underpinnings of the Waldorf curriculum.

### STRATEGIC PRIORITY TWO: COMMUNITY

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*“Fostering enduring connections within our school and the greater community.”*

We are a school encompassing many different communities, both internal and external. We strive to strengthen the connections within our school community, revitalizing our collaborations and support for one another, and our school. We also reach beyond ourselves to connect in the larger communities surrounding us.

### **STRATEGIC PRIORITY THREE: GOVERNANCE AND POLICY**

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*“Clear and unambiguous procedures and decision-making processes.”*

In order to promote transparency, re-enliven collaboration, streamline our processes, and foster efficiency, we will work in the short term to define, clarify, and document our roles, responsibilities, policies and procedures.

### **STRATEGIC PRIORITY FOUR: SITE**

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*“An inviting and wondrous site, supporting our financial, academic, and community objectives.”*

Cedar Springs Waldorf School is blessed to have in its possession a beautiful, oak-shaded campus in the Sierra Foothills. The wonder of nature, so inherent in our educational philosophy, is on full display straight from our doorstep! It is the physical representation of our philosophy, as a place of inspiration, learning, and gathering. In more practical terms, it is our place of business. Our land and buildings serve us in myriad ways, so we should certainly steward them in a manner befitting of their gifts.

### **STRATEGIC PRIORITY FIVE: FINANCE**

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*“Financial sustainability, enabling long-term investments in people, program, and place.”*

We must recognize that we are equally a Waldorf school and a business. We will under no condition surrender our essential character or founding principles. However, we also need to manage our resources in an organized and prudent manner, in order to successfully fulfill our mission and ensure our long-term viability as an organization. Our business practices should be complementary to the success of our academic program and vice versa.

## **IMPLEMENTATION--STRATEGIC OBJECTIVES:**

### **WALDORF EDUCATION OBJECTIVES:**

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Goal: Sustainability, accountability, and excellence in the fulfillment of our educational mission.

1. Teacher Retention
  - a. Attract and retain qualified teachers

- i. Conduct comprehensive review, and develop competitive salary and benefit package, as referenced in “Finance.” Timeline: 2<sup>nd</sup> - 3<sup>rd</sup> Quarter 19-20 (Mar 31, 2020.)
          - 1. Enhance opportunities for teacher development
          - 2. Enhance opportunities for teacher breaks
          - 3. Include teacher lounge in site plan, as referenced in “Site.”
          - 4. Work with other schools, as appropriate
        - ii. Evaluate practices for recruitment of teachers, and develop strategy to increase access of hiring committee to qualified teachers. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
      - b. Implement position of Pedagogical Administrator. Timeline: 4<sup>th</sup> Quarter 19-20 (Jun 30, 2020.)
        - i. Support Faculty
          - 1. Implement policies and guidelines determined by College of Teachers
          - 2. Increase opportunities for teacher development
          - 3. Provide oversight and ensure follow through
          - 4. Develop support plans for teachers
          - 5. Ensure quality and consistency of mentoring
          - 6. Facilitate administrative support for teachers
        - ii. Develop program
        - iii. Support parents
        - iv. Partner with Business Administrator to provide leadership for school as a whole
2. Curriculum Standards
  - a. Implement standards for grades curriculum, as designated by College of Teachers. Timeline: 1<sup>st</sup> Quarter 19-20 (Sep 30, 2019.)
    - i. Adoption of the Bonnie Rivers rubric
    - ii. Trackable metrics
    - iii. Assessment plans for K-8<sup>th</sup> grade.
    - iv. Conduct regular teacher evaluations.
      - 1. Mentor, support, observations and evaluations
3. Educational Program
  - a. Institute Eurhythmy as an ongoing part our program. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
    - i. Initially offer to K-4<sup>th</sup> starting 2019
    - ii. Offer to all grades – space required. Timeline 3-5 years.
  - b. Implement extra lesson support. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
    - i. Develop plan for funding, explore internal and external sources.
    - ii. Explore IEP services that can be provided
  - c. Further develop program for computer skills readiness. Timeline: 4<sup>th</sup> Quarter 20-21 (June 30, 2021.)
    - i. Make Cyber civics a mandatory offering for 6-8<sup>th</sup> grades.
    - ii. Explore other skills-building offerings, i.e., Typing class
  - d. Conduct evaluation of specialty subjects, and develop specialty subject program plan. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
    - i. Considerations
      - 1. Objectives and standards
      - 2. Reviews and evaluations
      - 3. Recruitment of qualified specialty faculty

- e. Evaluate and develop plan for expanding Early Childhood Village programs. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
    - i. Considerations
      - 1. Outdoor
      - 2. Afternoon KG
      - 3. Additional Preschool class
      - 4. Parent-Child
4. Anthroposophy
- a. Evaluate and develop parent education program. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
  - b. Develop and implement educational opportunities for the Board of Trustees and Administrative staff to study anthroposophy. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)

#### COMMUNITY OBJECTIVES:

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Goal: Broad-based and meaningful interaction in all relevant communities.

- 1. Culture
  - a. Reduce attrition rates by 20%. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
    - i. Action items
      - 1. Create increased opportunities for social bonding.
      - 2. Cultivate a culture of gratitude.
      - 3. Organize Get-togethers, celebrations
  - b. Develop action plan for seeking and receiving parent feedback. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
- 2. Communication
  - c. Conduct an evaluation of CSWS communication policy, determining strengths and weaknesses, and recommending possible changes. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
  - d. Develop comprehensive description of appropriate person for individuals to contact with concerns and questions, and distribute to community. Timeline: 1<sup>st</sup> Quarter 19-20 (Sep 30, 2019.)
  - e. Evaluate content, reception and potential for weekly community update, and integrate findings into its use. Timeline: 1<sup>st</sup> Quarter 19-20 (Sep 30, 2019.)
    - a. Festival life
- 3. Parent Engagement
  - f. Evaluate and develop Parent Engagement work plan. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
    - i. Considerations
      - 1. Tracking service hours
      - 2. Connect hours to enrollment
      - 3. School-wide, centralized data about what skills/services are needed, what skills/services are available
      - 4. Alumni
      - 5. Succession planning and mentorship
      - 6. Avoiding burn-out

- 7. Ensuring appreciation and gratitude
- 4. Community Outreach
  - g. Develop community outreach plan. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
    - a. Considerations
      - i. Value proposition
      - ii. Leveraging community advocates to get the word out
        - 1. Enrollment advocates
        - 2. Board members
        - 3. Active families
        - 4. Parents involved as external community leaders
      - iii. Increase contact points with greater community
        - 1. Sports league
        - 2. Summer Camp
        - 3. Parent Tot
        - 4. Service Projects
        - 5. Community events – Farm Day, etc.

#### GOVERNANCE AND POLICY OBJECTIVES:

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Goal: Elimination of confusion in decision-making and procedures.

- 1. Decision-Making
  - i. Clarify roles and responsibilities, as well as decision-making process, of CSWS governing bodies, including BOT, COT, PGSC. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
    - i. Considerations
      - 1. Evaluate influence of interested parties in Board decision-making as it relates to maintaining organizational independence.
      - 2. Continue monitoring checks and balances within organizational structure and decision-making.
  - ii. Conduct an evaluation of consensus practiced by our decision-making bodies. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
    - ii. Considerations
      - 1. The scope of consensus—within groups, between groups
      - 2. Appropriate for which decisions/Alternatives
      - 3. Role of opinion leaders on Potential for Consensus
      - 4. Conduct trainings annually
        - i. Role of facilitator
        - ii. Role of Committee representative regarding
          - 1. Reporting back
          - 2. Informing
          - 3. Including
          - 4. Seeking consensus
- 2. Transparency



- iii. Conduct an audit of CSWS policies with regard to current practice. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
  - i. Considerations
    - 1. College – Academic standards, pedagogy, curriculum
    - 2. Board – Financial, legal, human resources, health and safety
      - a. Update Board handbook
      - b. Annual review of Bi-Laws
      - c. All minutes available on website
      - d. Agendas available 7 days before BOT meetings on website
    - 3. Respective administrators to author and report
    - 4. When appropriate situations arise where no policy exists, develop and document thorough practice into policy.
- 3. Unified Vision
  - a. Conduct review and revision of mission, vision and values. One-three years, preferably by end of second year. (June 30, 2021.)
- 4. Legal Compliance
  - iv. Conduct a comprehensive human resource audit. Timeline: 3<sup>rd</sup> Quarter 19-20 (Mar 31, 2020.)
    - i. Considerations
      - 1. Review compliance with relevant laws
      - 2. Update employee handbook
      - 3. Review procedure for orientation and dismissals

#### **SITE OBJECTIVES:**

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Goal: Renew and make value-added investments in our existing campus.

- 1. Site Plan
  - a. Conduct site study and develop overall site plan. Timeline: 2<sup>nd</sup> Quarter 20-21 (Dec 31, 2020.)
  - b. Considerations
    - i. Redesign impactful areas to improve both function and aesthetics.
      - 1. Renew play spaces and the athletic field.
      - 2. Add functional and aesthetic fencing around designated areas.
      - 3. Front sign replacements
    - ii. Evaluate solutions to the storage problem—making use of both on and off-site locations.
    - iii. Develop functional spaces for academic and business purposes.
      - 1. Multipurpose space for eurhythmy, indoor gatherings, parents. (Yurt?)
      - 2. Faculty lounge / conference room / private office / improve bathrooms
      - 3. Expanded farm and gardening activities
      - 4. Hot lunch serving place and/or kitchen.
    - iv. Evaluate replacement of one or both portable buildings.
- 2. Health and Safety
  - a. Conduct audit of health and safety practices and policies, and develop comprehensive health and safety plan. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)

- i. Obtain necessary training.
  - ii. Continue to make essential maintenance and repairs, with an emphasis on health and safety.
  - iii. Explore and develop strategy around environmental health concerns.
- 3. Facilities
  - a. Increase Facilities and Equipment budget by 25%, then annually, to keep pace with need for replacement and increasing costs. Timeline: 4<sup>th</sup> Quarter 19-20 (Jun 30, 2020.)
    - i. Determine how to manage Facilities responsibilities with contractors, paid staff and/or volunteer staff, and implement.
    - ii. Continue to make essential investments in maintenance and repairs.
- 4. Traffic
  - a. Conduct evaluation of traffic practices and demand, and develop traffic plan in concert with enrollment plan to mitigate congestion. Timeline: 4<sup>th</sup> Quarter 19-20 (Jun 30, 2019.)
  - b. Considerations
    - i. Evaluate timing and places of release
    - ii. Consider obtaining vans for field trips. Timeline: long term.
- 5. Expansion
  - a. Conduct evaluation of property availability for future expansion in order to be able to take advantage of opportunistic property acquisitions when appropriate. Timeline: 2<sup>nd</sup> Quarter 20-21 (Dec 31, 2020.)

#### **FINANCE OBJECTIVES:**

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Goal: Operate profitably for the long-term health and viability of our organization.

#### **INCOME**

- 1. Enrollment
  - a. Increase Enrollment for new families by 10%. Timeline: 1<sup>st</sup> Quarter 20-21 (Sep 1, 2020.)
    - v. Considerations
      - 1. Increase outreach into community, as referenced in "Community"
- 2. Tuition Income
  - a. Conduct tuition analysis, and develop gradual increase plan to enable CSWS to sustain annual costs increases. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
  - b. Considerations:
    - i. Strive for tuition that is
      - 1. Competitive with like institutions
      - 2. Sustainable
    - ii. Evaluate impact on current families and develop strategy to implement with minimal impact on well-being and enrollment
    - iii. Maintain pricing flexibility of tuition up to 5%.
    - iv. Evaluate other areas where our financial office can increase convenience and efficiency in managing family school expenditures
- 3. Reserves
  - a. Build reserves of 5-10% of gross income annually. Timeline: Beginning 4<sup>th</sup> Quarter 19-20 (June 30, 2020, and every year thereafter.) (AWSNA recommended pg 21)

#### 4. Other Income

- a. Conduct Evaluation of investment options and develop strategy to increase. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
- b. Considerations
  - i. Short-term cash management
  - ii. Stock portfolio
- c. Reduce ratio of cost/return for generating donations to 35% or lower. Timeline: Prior to 1<sup>st</sup> Quarter 19-20 (July 1, 2019.)
  - i. Reallocate expenditures and conduct current fundraising programs with current staff and volunteers
- d. Increase new donors by 1%, returning donors by 10%, and average increase in individual donations by 1%. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
  - i. Increase outreach to parents and current/potential donors
  - ii. Evaluate and develop Parent Engagement work plan, as referenced in "Community"
- e. Look for opportunities to expand non-tuition income by seeking grants and business sponsorships.
  - i. Develop community outreach plan as referenced in "Community."

### **EXPENSES**

#### 5. Attrition

- a. Decrease attrition rates by 10%. Timeline: 4<sup>th</sup> Quarter 19-20 (June 30, 2020.)
  - i. See action items under "Community"

#### 6. Reductions

- a. Decrease ratio of reduction from Tuition Assistance Program to a sustainable level of 15% of gross income. Timeline: One-Three Years (June 30, 2022.) (Ref Book pg 69)
- b. Considerations
  - i. Conduct evaluation of other schools' financial aid programs
  - ii. Evaluate impact on current families and develop strategy to implement with minimal impact on well-being and enrollment

#### 7. Staff Remuneration

- a. Conduct comprehensive review of salary and benefit package. Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
- b. Develop new salary and benefits package and plan in time to implement for 2020-21 contracts. Timeline: 3<sup>rd</sup> Quarter 19-20 (March 31, 2020.)
- c. Considerations:
  - i. Strive for package that is
    1. Competitive
    2. Equitable
    3. Sustainable

#### 8. General Expenses

- a. Evaluate expenses with emphasis on return and efficiency, and make adjustments to upcoming budget, by end of fiscal year. Beginning 4<sup>th</sup> Quarter 19-20 (June 30, 2020, and every year thereafter.)
- b. Considerations

- i. Avoid duplication of efforts
9. Other Expenses
- a. Conduct Evaluation of debt, and develop strategy to accelerate decrease of debt Timeline: 2<sup>nd</sup> Quarter 19-20 (Dec 31, 2019.)
  - b. Considerations
    - i. Create sinking fund for the acceleration of debt repayment.
      - 1. Retire high-interest 7% note first

### **MONITORING PLAN:**

It is our intention that this Strategic Plan is a living, relevant document that lends itself to regular review and revision. Following designated timelines referenced throughout the document, those responsible for implementation will report progress to the Board of Trustees throughout the year, adjusting timelines as needed. Annually, the plan will be reviewed and revised by the Board of Trustees, driven by ongoing feedback from the implementation teams, other governance bodies, and current circumstances.