



Eugene Waldorf SCHOOL

Strategic Plan 2016-2019

November 1, 2016
Revised March 7, 2018

Core Issue 1

The Financial Health of EWS

Goal A • Financial Abundance: The Eugene Waldorf School (EWS) has stable funding to support its programs and site stewardship. We anticipate and prepare for times of fiscal challenge, while making plans based on a confident and practical assessment of our abilities to procure the necessary funding.

Context ~ The current funding processes are near-term focused and based on an annual cycle. Having a longer view will assist EWS in planning for less immediate but essential issues such as capital improvements, budget shortfalls, and tuition and salary strategies.

Action A.1 *Develop and implement strategies for increasing income, with the goal of fully funding the cost of the education we offer at EWS in striving to fulfill our mission. [Board, College, Administrator, PR and Enrollment Coordinator]*
IN PROCESS, BOARD

Action A.2 *Establish a 3-5 year budget that incorporates current and projected financial needs for compensation, program, and site, and creates a long-term funding plan. [Finance Committee, Board, College]*
DONE, ONGOING PROCESS IN PLACE

Action A.3 *Establish a regular review process for this multi-year budget that anticipates the future financial needs of the school and informs the long-term funding plan. [Board, Finance Committee, Funds Development Coordinator]*
DONE, ONGOING PROCESS IN PLACE

Goal B • Healthy Compensation: Teachers and staff are highly valued, receiving abundant, competitive financial support, including benefits and ample development opportunities.

Context ~ The Eugene Waldorf School recognizes that a high quality faculty (including early childhood, grades, subject teachers, and administrative staff) is a significant strength of our school. It is in our best long-term interest to nurture, support, and recruit outstanding faculty in all stages of their careers. Faculty support and development, as a part of our very school culture, strengthens our school as a whole. Our institution values and supports the people who work here, and envisions setting a positive social example for our students, parents, and greater community.

Action B.1 *Evaluate and prepare a target compensation package (including wage and salary, retirement, sabbatical, tuition remission, and other benefits) for faculty and staff, and create a five-year implementation plan which builds on the 3% wage increase in 2015-16. [Finance Committee, HR Committee, Board, College]*
IN PROCESS, HR COMMITTEE

Action B.2 *Review existing professional development needs, and create a plan for a Professional Development Fund to support ongoing faculty education. [Board, College, Finance Committee]*
DONE, ONGOING PROCESS IN PLACE

Goal C • Vibrant Community Life: Closeness, teamwork, and service characterize living within the circle of the Waldorf Community.

Context ~ The success of EWS is highly dependent on the interaction among the various bodies of the school. When those relationships are healthy and clear, progress is made in achieving the goals of each of the groups. Poor relationships, conversely, lead to frustration and stagnation.

Action C.1 *Formalize a system for soliciting feedback from parents so that their overall experience with the school can be understood and improved. Include a process for sharing the results by the end of the 2015-16 school year. [Administrator, College, Parent Council]*
DONE, ONGOING PROCESS IN PLACE

Action C.2 Create a timeline and process that evaluates all of the fundraising events held at the school annually for success against established goals. Make recommendations to the Board for needed changes. [Funds Development Coordinator, Committee, Administrator, Parent Council]

TABLED

Action C.3 Form a sub-committee to recommend and prioritize ways to build healthy relationship bridges within the Waldorf Community, both between individuals and between bodies. [Parent Council, College, Faculty, Administrator, Board, Faculty Chair]

DONE, ONGOING LEADERSHIP MEETINGS

Action C.4 Explore ways to improve the volunteer experience at EWS, including volunteer recognition. [Parent Council, Administrator, Funds Development Coordinator]

IN PROCESS, PARENT COUNCIL

Action C.5 Describe and publicize the school leadership structure. Clarify the responsibilities of the different bodies and how they are being held accountable. Establish regular, transparent communication pathways between the parent body, Parent Council, the Board, the College, the Faculty, and all employees of the school. Set clear response expectations for timeframes in which parents can expect a response from each group. [Administrator, College, Board, Parent Council]

TABLED, TASK FOR INCOMING ADMINISTRATOR

Goal D • Healthy Enrollment: Families looking for true Waldorf education come and stay, filling classrooms to capacity through the grades.

Context ~ Full classes allow for development of strong social relationships for each student, fulfill our interest in sharing the benefits of Waldorf education, and are a foundation of the school economy. Focusing on enrollment goals is very strongly associated with achieving our school vision.

Action D.1 Create a comprehensive plan to set and achieve a target FTE (full-time equivalent) that takes into account classroom capacity (both pedagogical and physical) and administrative capacity. Make recommendations for additional needed resources for implementation of the plan. Plan to be in place by the end of 2016-17. [Board, College, Faculty, Administrator, PR and Enrollment Committee]

IN PROCESS, BOARD

Action D.2 Identify 3-5 key barriers to full enrollment and implement a strategy to address those barriers. [PR and Enrollment Committee]

DONE

Action D.3 Review history of retention, identify opportunities and challenges for increasing retention, and make a retention plan to implement in 2016-17. [Administrator, PR and Enrollment Coordinator, Faculty Chair]

DONE

Action D.4 Clarify marketing and outreach strategy, and create a written document explaining the plan with strategic outcomes, timelines, and budget by December of 2016. [PR and Enrollment Committee, Administrator]

DONE

Action D.5 Coordinate the involvement of the staff, Faculty, and Board so there is ongoing and consistent outreach messaging. [PR and Enrollment, Administrator, Funds Development]

TABLED

Action D.6 Review the Vision and Mission of EWS to ensure that they are, and remain, current. [College, Board, Faculty, Parent Council]

IN PROCESS, COLLEGE & PARENT COUNCIL

Action D.7 Create a plan to effectively welcome and integrate new families. [Administrator, PR and Enrollment Committee, Faculty, Faculty Chair, Parent Council]

IN PROCESS, ADMIN & PARENT COUNCIL

Action D.8 Look at ways to support working parents in relation to the EWS schedule. [Administrator, College, Faculty Chair, Parent Council]

IN PROCESS, COLLEGE

Goal E • Robust Excellent Program: Educational programs built on strong foundations support teachers in deeply engaging students to meet future academic challenges and life opportunities.

Context ~ The focus of this goal is on establishing faculty support programs in order to strengthen the academic curriculum, ensure access to tools for teachers to develop professionally, and improve the protocols defining communication about student progress. These support programs need to be designed specifically to serve the unique needs of the individual staffing categories at the school: early childhood teachers, aftercare teachers, grades teachers, special subject teachers, educational support staff, and pedagogical administrative staff.

Action E.1 Utilize the tools that AWSNA and WECAN offer within their accreditation documents for an ongoing systematic review of the curriculum, as well as of the policies and practices for successfully delivering the curriculum. [College, Faculty Chair, Faculty, Parent Body, Consultant].

TABLED, UNTIL HALF WAY MARK TO ACCREDITATION

Action E.2 Clarify what are appropriate development opportunities for faculty and staff, and create a process how faculty and staff can participate in them. [College, Faculty Chair, Board]

DONE

Action E.3 Standardize a remedial case management process/protocol for students recommended for support. Ensure that the communication and implementation process is clearly documented for all participating parties. [Faculty Chair, Care Group, tutoring support teachers]

IN PROCESS, COLLEGE

Action E.4 Create a long term strategy for increasing the educational faculty at our school. Take the particular value of full time faculty for the school into account. [College, Faculty, Consultant]

IN PROCESS, COLLEGE

Action E.5 *Refine and explore assessment principles and practices for the school, including academic and developmental assessments. Establish written principles and procedures for teachers to follow. Clearly communicate the assessment principles, policies, and practices in use at the school to the parent body. [College, Administrator, Faculty Chair]*

IN PROCESS, COLLEGE

Core Issue 3

The EWS Campus

Goal F • Improved Site: A beautiful, well-planned and well-kept environment meeting the physical and aesthetic needs of the school into the future.

Context ~ The EWS campus is a wonderful resource. Challenges are significant, however, and include an aging facility with significant deferred maintenance, and a lack of clarity in the area of long-term planning to help direct improvement efforts. Since Master Planning is needed but would require significant resources, immediate efforts are best focused on evaluation of near-term improvements. Those improvements that are cost effective, improve the public perception, and address immediate maintenance needs. We urge that a longer-term master planning effort be initiated within 2-3 years.

Action F.1 *Remediation Assessment and Prioritization: Review the existing facilities with regards to their safety, their seismic viability, their accessibility, their maintenance and improvement needs, and provide cost estimates and a prioritization list. Improve the annual review process of the ongoing lists of remediation or improvements needed for each building and outdoor area. [Site Committee]*

IN PROCESS

Action F.2 *Site Utilization Assessment (SUA): Review the current use of buildings and grounds. Propose and implement improvements addressing the following questions: which activities are occurring at which location; what are the resources and space needs for these activities; what are their schedules; what shortcomings have been identified? Review the SUA on an annual basis. [Site Committee]*

IN PROCESS, COMPLETION TARGET SUMMER 2018

Action F.3 *Entry and Way-finding Improvements:*

1. *Improve the way-finding experience of community members and visitors of the school.*
2. *Make the entry to the main parking lot safer, more accessible, and more functional.*
3. *Develop a near term plan to design and place new signage that will help parents, visitors and guests in finding specific buildings, classrooms, programs, offices, bathrooms, parking spaces etc.*

[Ad-Hoc Committee under the Site Committee, PR and Enrollment Coordinator]

IN PROCESS

Action F.4 *Develop a process for a site master planning effort. [Board, Site Committee]*

IN PROCESS, LONG-TERM SITE PLANNING COMMITTEE

Core Issue 4

The EWS Message

Goal G • Impactful Community Relationships: Strong vibrant ties to the broader community build strong contributing relationships.

Context ~ With the recent addition of a half-time Funds Development Coordinator position and a new database tool, EWS is in the beginning stages of establishing successful, ongoing, reciprocal relationships with off-campus interested parties. We wish to continue to strengthen this effort with additional planning and clarity on next steps, focusing first on alumni, current donor, and business/organization partnerships.

Action G.1 *Clarify and strengthen the annual written strategy for engaging current donors, EWS alumni groups, and the active grandparents group. [Funds Development Committee Coordinator]*

TABLED, UNTIL ACTIVE BOARD COMMITTEE

Action G.2 *Outline and take the necessary steps to develop and grow a partner organization or business/current supporter list for reference. Centralize location for accessibility and set protocol for new contacts. [Funds Development Coordinator]*

TABLED

Action G.3 Create a marketing and outreach plan to successfully share with potential parents an accurate picture of what the value of a Waldorf Education consists of. Include a plan to improve the EWS website and the use of social media (FB, Twitter, Instagram) to better publicize the school and events. [PR and Enrollment Coordinator, Funds Development Coordinator, Administrator, Parent Council]
DONE

Action G.4 Identify and implement ways for EWS to be of greater service to the broader community. [Funds Development Coordinator]
TABLED, UNTIL ADEQUATE RESOURCES

Action G.5 Offer a Windows on Waldorf Tour as a point of entry event for members of the greater community. [Funds Development Coordinator, PR and Enrollment Coordinator, Administrator].
DONE

Goal H • Diversity and Economic Accessibility: Students, teachers, and staff at EWS reflect healthy economic and cultural diversity.

Context ~ As a private school, we must remain vigilant in our efforts to maintain healthy diversity.

Action H.1 Leadership bodies watch AWSNA webinars on diversity and on financial health by the end of the 2015-16 school year. [Board, College, Parent Council, Faculty sub-group]
DONE

Action H.2 Evaluate how to review current hiring practices, enrollment practices and school culture to increase understanding of how they impact this goal and make recommendations for improvement as needed. [HR Committee, PR and Enrollment Coordinator]
IN PROCESS, DIVERSITY FACULTY SUB-GROUP

Action H.3 Assess the effects of the tuition assistance and scholarship programs on cultural and economic diversity on a regular basis. [Finance Committee, Board]
IN PROCESS, AS A PART OF DIVERSITY AUDIT AND BOARD REVIEW

Action H.4 Discuss how the curriculum and social climate of the classrooms are impacting healthy diversity, and make recommendations for improvement as needed. [EWS Faculty Sub-group consisting of EC, grades and specialty teachers]
IN PROCESS, AS A PART OF DIVERSITY AUDIT

Goal I • Maintain the value of the strategic planning process: For the planning process to have value, it must be kept current and useful.

Context ~ Strategic planning is an ongoing process. By checking progress against the plan and renewing the clarity of the vision that informs it, the plan continues to offer value in coordinating the work of leadership bodies in the school.

Action I.1 Review the Strategic Plan annually for needed updates, clarification, and progress. [Strategic Planning Committee]

DONE, ONGOING PROCESS CURRENTLY BEING CREATED

Action I.2 Review the representation of relevant groups of the school community on the Strategic Planning Committee to ensure appropriate perspectives are being held. [Board, College]

DONE

Future Seeds Additional Goals identified by Community

There were additional goals identified in the community meetings. The Strategic Planning Committee understood their significance as being relevant in a timeframe past that covered by this plan. We feel it is important to keep them in the document as a reminder that they represent areas that the community would like to keep alive for the future.

Goal J • Waldorf High School: A dynamic Waldorf high school at EWS.

Context ~ Recognizing that the Waldorf curriculum is intended to continue through twelfth grade, building capacity within EWS to provide these additional grades would allow for the full depth and breadth of Waldorf education to be provided to students.

Action J.1 Organize a presentation of current status and goals by Eugene Waldorf High School (EWHS) organization to Faculty, Board, and Parent Council, and provide a summary of this information to the community at large. [Faculty, Board, Parent Council]

Action J.2 Initiate a group reading/study of “older-adolescent years” by faculty and/or parent group as related to Steiner’s vision of full arc of K-12 education. [Faculty, Parent Council]

Action J.3 Consider having a liaison from Board and/or Faculty participate in EWHS meetings and support continued development of a Waldorf high school, including formal endorsement and support of the effort through website links and updates, co-marketing, and potential synergies. [Board, Faculty]

Goal K • Garden to Snack Basket: A community kitchen provides a lunch program utilizing produce sustainably grown on-site.

Context ~ While there was interest in the stakeholder groups in further building the garden and food program at EWS, the planning committee feels that success in this area is dependent on increased clarity in the realm of site planning prior to investing in the development of an expanded garden program. However, defining how a future garden program would support educational efforts and teachers' class activities would guide a future program.

Action K.1 Consider how site improvements can better accommodate the current class food efforts in the short-term. [Site Committee]

Action K.2 Assess the need for a garden program by 2017-18. [Faculty Sub-group]