

Olympia Waldorf School

A Strategic Plan

OWS Board of Trustees
Adopted January 10th, 2015

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Introduction

For nearly 30 years, the Mission of the Olympia Waldorf School has guided a deeply embraced Vision of unique educational experiences for students and their families. This document builds on the previous visioning and planning efforts and is intended to renew and refresh the Vision based on current needs and resources. It is important to recognize contradictions or inconsistencies found in these experiences, the OWS community Mission and pedagogy, and devise a strategy – a Plan – for implementing a necessary change of course. Through the hard work and dedication of many participants, this approach is our Strategic Journey.

It is a Journey because it involves preparing the best way for the school to respond to circumstances – some known and some not – in pursuit of its Vision. It means being aware of our school's goals, being aware of our resources, and successfully incorporating both into a comprehensive plan that consciously responds to a dynamic educational environment. It means holding our Mission in today's environment and – through our Vision – connecting to our future. The Plan is not unlike a map, which commits our effort to produce fundamental decisions and actions that will guide us toward success.

It is strategic because we recognize up front the most critical strengths, weaknesses and challenges and then commit our efforts towards embracing or changing them. It is no more and no less a series of decisions about what to do, why to do it, and how to do it. We continue by acknowledging the impossibility of completing everything that we would like to do and recognizing that some organizational decisions and actions are more important than others. We also recognize available resources play a role in when goals can be achieved and the need for flexibility to capitalize on opportunities that will further us in our journey. We strategize further by making the tough decisions about how to go about achieving our aims. Finally, we commit ourselves to finding the resources to carry it all through.

In short, the strategy to change our course is as follows.

1. Approach – What is our Vision for a healthy school? Is our Mission guiding it?
2. Goals – What are our priorities? On what do we focus right now?
3. Objectives – How do we accomplish our goals?
4. Action Plans – What resources are needed? Who will lead? When will it happen?

In facing our challenges – to know who we are, to know where we want to go and to know how to get there – all we have to do is focus our will and honor the work. This, in its healthiest form, is the Plan.

History

Inspired by an introductory lecture given by Elana Freeland in 1983, a handful of parents set to work to establish a Waldorf school in Olympia. In March 1985, the Olympia Waldorf Education Association was formed and was recognized by the Association of Waldorf Schools

of North America (AWSNA). After gaining legal nonprofit status and adopting bylaws, Olympia Waldorf School opened its doors to 17 young children that fall.

The school added grades one by one until we graduated our first Grade 8 class in June 2000. Now, each spring we send out into the world a group of amazing young people. Our program has expanded to include a preschool, two kindergartens, and eight grades.

Olympia Waldorf School's Prairie Hall was formerly the home of the East Olympia School and was originally called the Chambers Prairie School. It was built in 1914 and opened its doors in 1916 to 38 students and two teachers in Grades 1 through 8. This homey, wooden building has been in continuous use as a school ever since. After 5 years of renting space, Olympia Waldorf School took a great step forward in 1990 and moved into this beloved historical site. In 1999, our community built a new Middle School building, and in 2007, we renovated and opened the Kinderhaus on adjacent property.

Since the start of the Olympia Waldorf School, planning strategically for the future has been a tool, or map, for our community to flourish, maintain our mission, and to take steps toward our vision.

2003 8-Year Plan

In 2003, the Olympia Waldorf School adopted an 8-year plan to identify steps to take to further the community vision. Building off of past efforts and community dialogue, the plan identified actions to add improvements and resources to OWS in the following categories:

- Educational Distinction
- Spiritual Nourishment
- Building Community
- Site Development
- Economic Strength

This 8-year plan also included a master plan for the campus identifying existing buildings, future buildings, parking, and field use.

A copy of the 2003 8-year plan is available in the Olympia Waldorf School office for review. Appendix A also shows the spreadsheet identifying the action items and their status, and the campus site plan.

2005 Strategic Plan

The 2005 Strategic Plan was a full review of the Mission, Vision and Goals of the OWS community. This plan was developed through an extensive conversation with the community. Over 30 people representing parents, teachers, staff, and Board members gathered for a full-day retreat to test the Vision and Mission and develop goals and actions through the strengths-weaknesses-opportunities-threats (SWOT) method. The school also held conversations at all-school meetings and conducted a community survey that yielded a 35% response rate. As a result, the strategic plan was able to lay out a framework of actions

to occur over the ensuing 2 years that would achieve or enhance the identified goals related to:

- Public Relations
- Organizational Infrastructure
- Academic Standards
- Capital Assets
- Enrollment
- Institutional Self-Knowledge
- Fundraising
- Implementation and Monitoring

The 2005 Strategic Plan complemented the 2003 8-year plan. A copy of the 2005 Strategic Plan is available in the Olympia Waldorf School office for review. A spreadsheet identifying the action items identified in the 2005 plan and their status is included in Appendix B.

2008 Recession

Before the process could begin to update the 2005 strategic plan, the economic recession began. This forced the OWS community to make decisions reactively to an environment of unstable finances and enrollment instead of planning proactively. As a result, budget cuts had to be endured that affected our curriculum, teachers, staff, parents, and the entire community. Many gains from past planning efforts were lost. There were many difficult decisions made, but they were made and prioritized in light of the community Vision and Mission to ensure the core pedagogy and purpose were maintained.

2009 Strategic Goals

The Board of Trustees initiated a review of the Mission and Strategic Goals of the OWS community again in 2009. Using the 2003 8-year plan and the 2005 Strategic Plan, the Board of Trustees conducted community meetings and parent surveys to spark community conversation and feedback. It was agreed that the mission and goal statements were very valuable, represented the community, and hit the mark but were difficult to remember and identify due to their length. Through this community dialogue, the mission and goal statements were honed to their essence. In 2010, the following Mission Statement and Goals were adopted by the Board:

Olympia Waldorf School Mission:

Awakening minds, enlivening hearts and engaging hands for lifelong learning.

Goals for Olympia Waldorf School:

- Increased Enrollment & Community Involvement
- Academic Excellence
- Quality Performance

2011 AWSNA Accreditation

In 2010, OWS began the accreditation process as a member of the Association of Waldorf Schools of North America (AWSNA). The strategic plan update was put on hold until the completion of this accreditation process. During this thorough review process, representatives of other Waldorf Schools visited our campus and reviewed our programs. Based on interviews with teachers, staff, Board members, and parents, the accreditation team developed recommendations for the school. These recommendations reinforced actions identified in our past planning efforts, gave us ideas to work towards, and provided us with a stronger foundation for our current strategic plan development effort. OWS received its accreditation in 2011. The complete AWSNA Accreditation report is available for review in the Olympia Waldorf School office. A summary of the major recommendations outlined in the report is included in Appendix C.

2014 Strategic Plan

In 2009, work began to review and update the 2005 Strategic Plan. Being in the midst of the economic recession, the school did not have the resources to hire a consultant to assist in updating the plan or hosting charrettes, as was done for the 2005 plan. Because the OWS community considered the strategic plan to be very important, parents, faculty, staff and Board members agreed to volunteer their time and effort to start work on the update. This work was suspended, however, to allow the AWSNA accreditation process to unfold and provide guidance for the development of the strategic plan. The results of the accreditation report were truly informative and provided a foundation for actions that OWS continues to pursue as we grow. The accreditation report also confirmed that we are on a sound path. Using the past strategic plans, the 2009 strategic goals, and the AWSNA accreditation process as a foundation, work resumed in 2012 on updating the strategic plan.

In 2012, the Board of Trustees established a Strategic Plan Workgroup made up of board members, administration, and faculty to begin formulating a draft document. The first step the workgroup took was to ask the faculty and staff to provide a list of facility, curriculum, and outreach resources needed to provide a full and holistic Waldorf school experience; this group used the AWSNA report, adopted Mission and Goals, and the 2005 Strategic Plan as a basis. This feedback was consolidated into a spreadsheet indicating the types of program enhancements to the education, advancement, and administration programs that would meet the school's mission. The school's business manager added in the estimated cost and full time equivalent (FTE) staffing needed to support the list of program enhancements.

The work group and Board of Trustees then shared the draft list of program enhancements and asked the entire OWS membership (parents, faculty, and staff) to add, subtract, and prioritize the list of program enhancements important to them. These conversations occurred at multiple all-school meetings in the spring of 2013 and spring of 2014. At the spring 2014 all-school meeting, the attendees were asked to place dots next to the program enhancements they felt were their top 5 priorities to provide a visual ranking that demonstrated those actions most important to our community. A spreadsheet summarizing the rankings is included in Appendix D. This feedback has been very instrumental in

informing and shaping the newest strategic plan. After several years of work and dialogue, a strategic plan for 2014 and beyond with the following Mission, Goals, and identified actions to achieve the school's Mission and Vision was presented to the Board of Trustees.

The Mission for Olympia Waldorf School

Awakening minds, enlivening hearts, and engaging hands for lifelong learning.

The Board of Trustees for Olympia Waldorf School adopted this mission statement in 2010. This statement serves as a reminder of why we, as parents, faculty, and/or staff, seek out and join and become active in the Olympia Waldorf School community. Every action we take or decision we make, whether as individuals or as a community, should be done in a manner that supports our Mission.

The Overarching Goals and Vision for Olympia Waldorf School

In addition to adopting the mission statement for Olympia Waldorf School, the Board of Trustees also adopted a consolidated set of strategic goals with the consensus of the OWS community. The 2010 strategic goals of increased enrollment and community involvement, academic Excellence, and quality performance were reviewed by the Strategic Plan Workgroup, the school community through discussions at several all-school Meetings, and the Board of Trustees. The question was asked if the 2010 Strategic Goals provided a clear picture of where we saw the school in 1, 5, 10, or 20 years. Discussions and debate occurred about the context of strategic goals, and a consensus was developed that they should set a clear vision and overarching benchmark and be broad enough to apply to the entire community. For example, academic excellence can easily be focused on a specific discipline of academia, but we as a Waldorf community believe that excellence in education is holistic and not specialized. Also, we are here to educate the children, but we as parents, faculty, and staff are at various points of lifelong learning that also need to be supported.

The outcome of this discussion was the establishment of the following overarching Vision statements that support the Olympia Waldorf School Mission and will guide future decisions by the Olympia Waldorf School community:

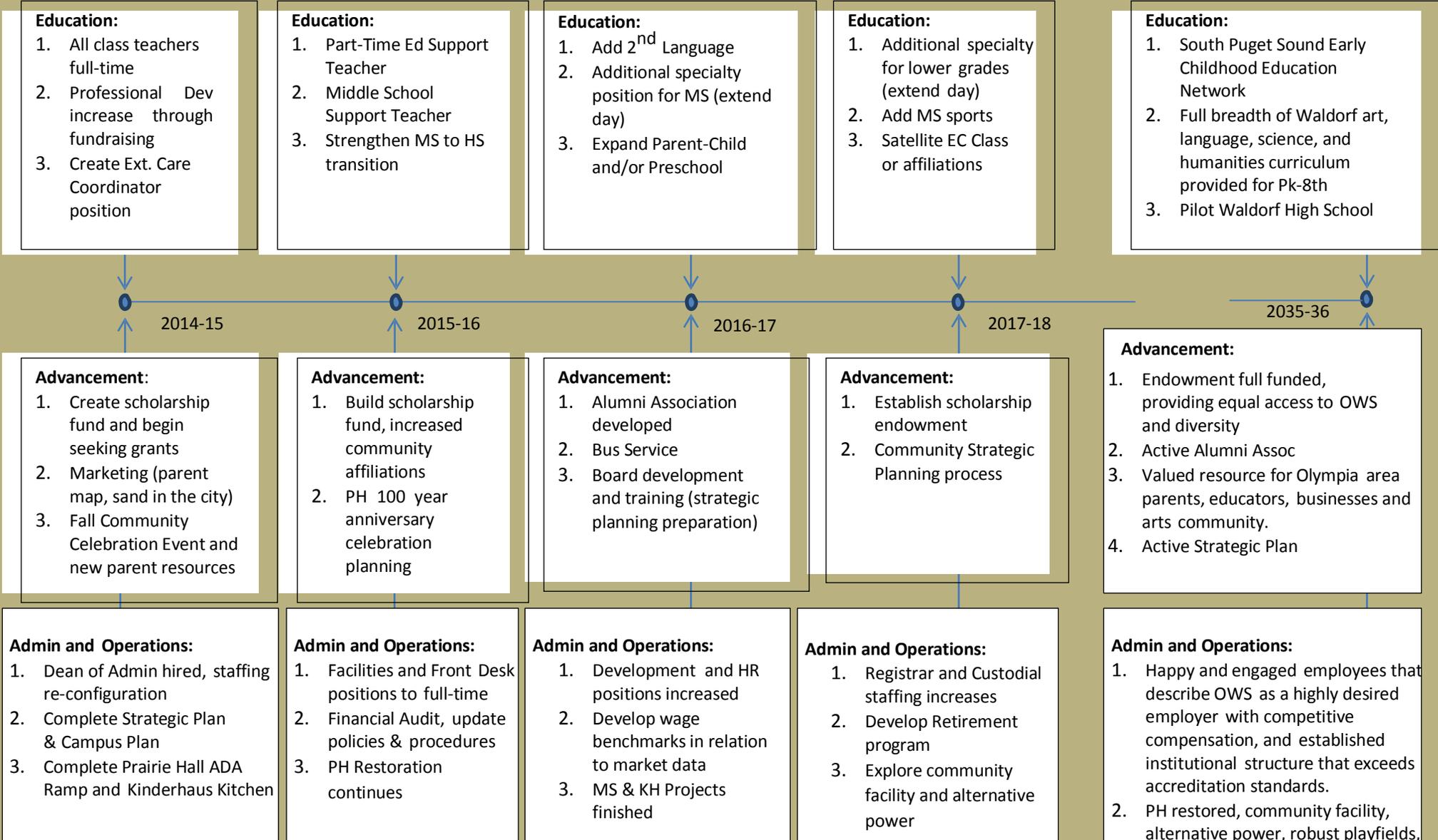
- **Vibrant School Community**
- **Holistic Educational Excellence**
- **Healthy Workplace Culture**
- **Regionally Present and Engaged**

The Strategic Goals

The following chapter identifies the Goals as actions we should take that are steps to achieve or maintain the above Vision statements and further the Olympia Waldorf School Mission. We organized the action items by placing them into three categories. Education, Advancement, and Administration, & Operations. Even though the actions are within specific categories, we find they achieve multiple goals, which demonstrates the holistic approach of this strategic plan.

In addition to identifying the desired goals and actions, it is also important to indicate when certain goals are to be achieved. For simplicity and clarity, the following 4-year timeline was created that identifies the year, the category, and goal to be achieved. The timeline also provides the long view to the year 2035-2036, the school's 50th anniversary, and a vision for the school that we are working towards. Following the timeline is a brief summary of each goal or action and how it achieves the school's mission and vision.

Strategic Plan Priority Goals DRAFT timeline 2014-2017:



Olympia Waldorf School Mission: Awakening minds, enlivening hearts, and engaging hands for lifelong learning

Vision for Olympia Waldorf School:

- Vibrant school community
- Holistic educational excellence
- Healthy workplace culture
- Regionally present and engaged

Educational Priorities

The following is a summary of those goals and actions identified as priorities and how they achieve the Mission and overarching goals and Vision for the Olympia Waldorf School.

2014-2015

- 1) All Grades Teachers at Full Time Status:** This allows all classes to have a more consistent presence of their class teacher and gives the possibility for more creative programming for specialties.

How this aligns with our Vision: This contributes to a Healthy Workplace Culture by providing jobs that are fairly and equitably compensated. This also contributes to Holistic Educational Excellence by providing a lengthened and consistent amount of time for the lead teachers to be with their children during the teaching day. Follow through is easier for social health and academic issues.

- 2) Increase Professional Development:** Raising funds so that teachers and staff can attend annual trainings allows them to deepen their understanding in areas such as grades intensives to prepare for the coming year, special subject trainings such as Teaching Science in the Waldorf Schools, Training in Educational Support, Artistic Trainings, Spatial Dynamics, etc.

In-House Mentors and Evaluations: Visiting Waldorf trainers will work with teachers and parents on ongoing development in instruction and parenting support.

For Staff: Trainings in outreach and marketing, fundraising, strategic planning, etc.

For All: Trainings in healthy listening/communication, social health and team building

How this aligns with our Vision: By accomplishing this goal, the continually improving OWS program will meet the priority of Holistic Educational Excellence by better serving a diverse community to prepare them to become lifelong learners. This will, in turn, strengthen our presence and impact on our Regional Engagement.

- 3) Hire Extended Care Coordinator:** A part-time person will be in charge of the administration and programming of the Extended Care Program throughout the year.

How this aligns with our Vision: This will contribute to a Healthy Work Place Culture by dedicating one staff person to all of the components of this job rather than parceling out the many responsibilities amongst the Dean of Education and the Administrative Staff.

This will also contribute to a Vibrant School Community by providing consistent staffing - building healthy relationships with children and parents and increased depth of program development.

2015-16

- 1) **Part-Time Educational Support:** This person would support teachers, parents, and children and better serve a diverse community of learners. This could include assessments; strategic interventions with the whole class, small groups or individuals; and participation in parent-teacher conferences.

How this aligns with our Vision: This will contribute to Holistic Educational Excellence. When everyone gets the support they need to achieve their full potential, the teachers' time can be used most efficiently to guide the whole class. This also will contribute to a Vibrant School Community by creating improved social health and more manageable classrooms. And by offering more support to teachers and learners, this will increase teachers' understanding of their students' varying needs and also contribute to a Healthy Work Place Culture.

- 2) **Middle School Support Teacher and HS Transition:** This person will support the Middle School program through teaching added specialty classes: woodworking, drama, advanced math, etc. and perhaps occasional blocks. This will ensure that students have what they need to make a successful transition to high school.

How this aligns with our Vision: This will contribute to Holistic Educational Excellence by deepening and expanding the Middle School program.

2016-2017

- 1) **Add a Second Language:** The school used to have Spanish as a second foreign language. Having a second language from a different root than German would stimulate language learning and increased openness to other cultures in the children.

How this aligns with our Vision: This will contribute to Holistic Educational Excellence by giving the students a challenge to expand their mental and social capacities. It will also strengthen our participation in our region because of the large population of Spanish speakers in our region. In addition, it will encourage students' appreciation of diverse cultures and broaden communication skills.

- 2) **Additional Specialty for Middle School (Gardening, Eurythmy):** Right now the class teachers teach all specialties except German and strings, which requires a great deal of preparation and not very many teaching breaks.

Eurythmy is a class that is unique to Waldorf education. It is social, healthy and artistic in many ways, exposing the children to moving to music (rhythm, melody and harmony),

wonderful poetry (rhythm, sounds of speech and moods), and stories. They learn to move as an individual, gracefully through space and also as a group, cultivating awareness of sharing space with others and making beautiful forms together. Nothing replaces eurythmy!

How this aligns with our Vision: Having a thriving eurythmy program contributes to Holistic Educational Excellence because it unites so many elements of movement, social, artistic and healthy work in one class! These are all ways that assist students' neurological development for learning.

Gardening is a well-rounded experience for the children. It cultivates a practical awareness of the seasons and weather as well as soil conditions and crops that thrive in our environment. The children can get joyfully dirty and develop strong muscles and coordination as they learn practical science in an age-appropriate way.

How this aligns with our Vision: Gardening contributes to Holistic Educational Excellence through practical hands-on learning activities, which reinforce learning. Having a gardening program will also contribute to a Vibrant School Community when we can all share in the work and the bounty of a garden. It also creates a Healthy Workplace Culture that is more balanced with hand, heart, and head work.

- 3) Longer Middle School Day, Expand Parent-Child and/or Preschool:** Expanding the middle school day will allow more options for the students to deepen their work and enjoy more specialty classes.

Vision: This will contribute to Holistic Educational Excellence and a Healthy Workplace Culture when more work can be carried by more staff and over more time, thus giving teachers more flexibility and time to deepen curriculum topics and offer additional learning strategies.

If the Parent-Child program expands to 2 days/week, this would give more families a chance to meet other parents and find out about the school earlier. The same would hold true for expanding the Pre-School from 3 to 5 days.

Vision: This would contribute to a growing Vibrant School Community by increasing our enrollment and strengthening relationships between the families of young children. This could also help our Regional Participation by offering something unique and needed by the community around us.

- 1) Additional Specialty for Lower Grades (Extend Day):** This would be a return to our original length of day, which would allow for more variation of specialty classes and more movement opportunities overall.

Vision: This would contribute to Holistic Educational Excellence by allowing teachers to have the time to create a more balanced day with a greater variety of learning opportunities.

- 2) Add Middle School Sports:** Team sports and circus arts are very appropriate and helpful for the middle school students teaching teamwork and building strength, coordination, and skills for sheer fun and healthy camaraderie.

Vision: This would contribute to our Holistic Educational Excellence by giving adolescents healthy, fun outlets for their abundant energy and social needs. Students learning and showcasing their skills within the supportive environment of the school will also contribute to a Vibrant School Community.

- 3) Satellite Early Childhood Classes:** This would be off-campus classes that would be located closer to families in distant areas who would love to have Waldorf education available to their young children without having to drive so far.

Vision: This would contribute to our Regional Participation and a Vibrant School Community by reaching new families and hopefully increasing our enrollment in the grades eventually. Satellite classes will allow a broader base of students and families to be impacted by OWS and grow its reputation as a viable and relevant academic option within the region.

Advancement Priorities

The following is a summary of those goals and actions identified as priorities and how they achieve the Mission and overarching goals and Vision for the Olympia Waldorf School.

2014-2015

- 1) Create a Scholarship Fund and Begin Seeking Grants:** Olympia Waldorf School strives to develop a diverse student population and serve every family seeking Waldorf education. The tuition assistance program addresses the needs of families who are not able to pay the full tuition rates. Tuition assistance is rewarded based on need and is limited to an amount of 10% to 12% of total tuition revenue per year. Establishing a healthy and growing scholarship fund will offset the effect of tuition assistance on the budget and provide access to additional families seeking Waldorf education who are in need of tuition assistance.

Development of a scholarship fund also positions OWS to be competitive in seeking grants by demonstrating to granting agencies and organizations that OWS is a generous community striving to financially support our mission of Awakening minds, enlivening hearts, and engaging hands in lifelong learning.

How this aligns with our Vision: A scholarship fund supports a Vibrant School Community by growing a diverse student and parent population, bringing many walks of life, perspectives and experiences together. This also supports Holistic Educational Excellence and being Regionally Present and Engaged by reducing barriers to all who seek Waldorf education and demonstrating to our region that OWS is a diverse and accessible school open to our community.

- 2) Marketing (Parent Map, Sand in the City):** Communicating to the South Sound Community the value of Waldorf education and setting it apart from other educational opportunities is fundamental in increasing enrollment and seeking fundraising support from the broader community. Continuing and expanding marketing activities such as participating in community events such as Sand in the City, Arts Walk, festivals, forums, etc. and finding ongoing marketing opportunities for Olympia Waldorf School is important to communicate the value of Waldorf education.

Communicating internally to the existing OWS community the value families have received through their tuition dollars and volunteer hours is also important to ensure enrolled families are aware of the many benefits they are receiving through OWS in order to retain our existing families.

For Staff: to expand marketing activities, staff hours will need to be increased, and continual professional development training in outreach and marketing, fundraising, strategic planning, etc. will also need to be provided to develop professional skills.

For All: The best marketing strategy is parent testimonials. A pool of parent volunteers (school ambassadors) will need to be developed and fostered to assist OWS marketing staff in preparing and attending marketing events. The parent volunteer group will be a dynamic group from year to year and thus will need annual training and coaching in marketing and presentation skills.

How this aligns with our Vision: Marketing externally to the South Sound community implements the goal of being Regionally Present and Engaged. By being present in the South Sound region, the broader community will see the importance of a holistic education and the parent support provided by OWS, the value that OWS brings to the region, and thereby be more likely to seek enrollment and/or support our school through fundraising. Internal marketing contributes to a Vibrant School Community. As existing families understand the actual value they receive from their tuition dollars and volunteer efforts, they will be more apt to continually support and attend school events and by word of mouth promote the value of Waldorf education to families new to OWS and the broader community.

- 3) Fall Community Celebration Event and New Parent Resources:** In the school year, fall is the time of renewal, when children and parents continuing their Waldorf journey are returning to the school after summer vacations. Fall is also the time when newly enrolled children and parents start their Waldorf journey of discovery and enrichment. It is important that we provide an opportunity to reconnect with each and welcome the new families into our community, provide answers to the many questions and provide support to each other. A Back-to-School Celebration event is a new way to bring the new and the old together through potluck, activities and information tables to provide support and connect with each other.

How this aligns with our Vision: This type of community event supports all of the overarching goals because it brings people together, provides education resources, allows personal connections to be made, builds relationships and improves communication between parents, staff, and faculty, and helps demystify “Waldorfian way nuances.” Parents then gain a better understanding of the OWS community and curriculum, and they learn who to ask when questions arise, where to go for services, and how to engage the OWS community. All of these things support a Vibrant School Community, Holistic Educational Excellence, and Healthy Workplace Culture.

2015-16

- 4) Build Scholarship Fund, Increase Community Affiliations:** Continued maintenance and growing of the scholarship fund will only increase opportunities for any family seeking a Waldorf education to access our school and increase the value of our tuition dollars. Building community affiliations with organizations such as community foundations, charitable organizations, SPSCC, or Evergreen State College will increase the broader community awareness and support of OWS and provide opportunities for professional development, parent enrichment and/or grow “outside the walls” fundraising dollars.

How this aligns with our Vision: Continued growth of the scholarship fund and building new community affiliations will increase our capacity to provide access and deliver a robust and holistic education experience to our children, provide opportunities for additional professional development and parent enrichment, and connect with the broader South Sound community, which supports Holistic Education Excellence, Vibrant School Community and being Regionally Present and Engaged.

- 5) **Prairie Hall 100 Year Celebration Planning:** Built in 1914, Prairie Hall is the quintessential school house that has stood the test of time. Originally called the Chambers Prairie School, its doors were opened in 1916 to 38 students and two teachers for grades 1 through 8. It has been a school ever since. OWS bought and moved into the school in 1990. Prairie Hall's 100th birthday is fast approaching, and a party celebrating 100 years of educational service to the community is important. This celebration will provide an opportunity to invite the broader community to share in the history of the school and the community roots it has grown over the last century.

How this aligns with our Vision: A community celebration is an opportunity to connect and be Regionally Present and Engaged. Inviting residents of the East Olympia community, Tumwater School District, Historical Societies, local tribes, and Thurston County residents to share in the rich history and understand how we are all connected to the school house will facilitate community involvement and develop pride in the OWS community in regard to Prairie Hall, fostering a Vibrant School Community.

2016-2017

- 1) **Alumni Association Developed:** The Olympia Waldorf School opened its doors in 1985. Over the past 30 years, many 8th grade classes have graduated and continued their journey in lifelong learning built on a foundation provided by OWS. Developing an Alumni Association is a way for the students and school to remain connected to each other. Outreach to OWS alumni through newsletters, social media, and events should be developed to maintain this important connection. Through this outreach, alumni may be willing to give back to OWS by volunteering, offering testimonials, or giving gifts.

How this aligns with our Vision: Developing and maintaining connections to OWS alumni fosters a Vibrant School Community by engaging an important identity of our school--our students past and present. We share and celebrate in their success as our alumni share in the success of OWS. Providing opportunities for OWS alumni to give back to the school, whether through volunteering, testimonial and/or gifting also promotes and contributes to a Holistic Educational Excellence.

- 2) **Bus Service:** Located in East Olympia, OWS serves a broad geographic area as families from the surrounding communities seek a Waldorf education. Commutes to the school average 20 minutes or more, with the largest population cluster located in the adjacent Tumwater,

Olympia, and Lacey communities. The morning drop off and pick up commute can be a barrier to families seeking an education at OWS. To reduce this barrier, development of a bus service that would have strategic pick up and drop off locations would provide a service that is needed. Capital funds would be needed to purchase a bus or van, and a staff position would need to be created and funded on an on-going basis.

How this aligns with our Vision: Providing bus service would provide a service to the parent community and increase access to potential families who may see the commute to the school as a barrier. This would support the Vibrant School Community and Regionally Present and Engaged portions of the vision by providing this service to increase access and school diversity.

- 3) Board Development and Training:** The Board of Trustees is made up of parent volunteers with various backgrounds and perspectives they bring to support and guide the school. Board member terms are generally 3 years, so there is regular turnover. In making decisions related to policy, strategic planning, marketing, and budgeting, it is important that board members receive regular board development training on Waldorf pedagogy, how to manage a nonprofit, financial reporting, personal and fiduciary responsibility, etc.

How this aligns with our Vision: A Board of Trustees that has been trained and understands the role of the board, how to budget, how to manage a nonprofit entity and most importantly the OWS mission and Waldorf pedagogy will make better and informed decisions that contribute to all of our goals to develop a Vibrant School Community, Holistic Educational Excellence, Healthy Workplace Culture, and being Regionally Present and Engaged.

2017-2018

- 1) Establish Scholarship Endowment:** Establishing an endowment has been a goal of the OWS community for several years. Establishing a scholarship fund as identified for 2014-2015 year starts the process with the goal of the fund potentially growing into an endowment, with interest earnings that can be used to provide tuition assistance. The establishment of the endowment will rely on starting actions discussed in previous years, such as marketing, grants, and developing community affiliations and an alumni association.

How this aligns with our Vision: Establishment of an endowment will reduce the pressure of year-to-year fundraising and as it grows will provide opportunities to expand tuition assistance and tuition remission for staff and provide greater access to OWS education to families, which achieves a Vibrant School Community, Holistic Educational Excellence, Healthy Workplace Culture, and being Regionally Present and Engaged.

- 2) Community Strategic Planning Process:** This strategic plan needs to be constantly monitored and updated to reflect current situations. This effort does take time and effort. Planning for

the update is important, and while this plan looks to achieve a vision as far away as 2035, specific actions to realize that vision are set in a 3-year time frame. In 2017-2018, this plan will need to be updated to identify actions over the ensuing 3 years that move OWS along the path to 2035.

How this aligns with our Vision: The strategic plan identifies the Mission for OWS and provides a framework of actions to realize the Mission, which guides decision making with the OWS community. As such, strategic planning supports and reinforces all the vision statements and goals.

Administration and Operations Priorities

The following is a summary of those goals and actions identified as priorities and how they achieve the Mission and overarching goals and Vision for the Olympia Waldorf School.

2014-2015

- 1) Dean of Administration Hired, staff re-configurations:** 2014-2015 is a year of transition in the administration realm of OWS. After many years of service, the business manager for the school moved out of the community. This created the priority to hire a Dean of Administration to maintain continuity in the administration of the school's financial, enrollment, marketing, and personnel affairs. This also created an opportunity to reconfigure the administration staff and set work priorities based on the strategic plan and priorities of the school community. Focusing on enrollment, marketing, and fundraising to grow the school population and create capacity in the curriculum have been identified as priorities to achieving the school mission.

How this aligns with our Vision: The Dean of Administration is an important role in implementing the priorities of the school. Guided by the board, the strategic plan, personnel policies, and marketing strategies, the Dean of Administration fosters a Vibrant School Community and a Healthy Workplace Culture and ensures OWS is Regionally Present and Engaged.

- 2) Complete Strategic Plan and Campus Plan:** It has taken more than 4 years to complete this strategic plan to identify and reinforce the Mission, Vision, Goals, and priorities of OWS. Over the past 6 years, OWS has experienced a lot of changing dynamics from the recession, budget cuts, staff turnover, and board turnover. A campus plan is also very important to meeting our Mission and informing the budgeting process to raise funds for those campus improvements. It is important to complete the strategic and campus plans to provide a road map for decision making to meet the OWS Mission of "Awakening minds, enlivening hearts and engaging hands for lifelong learning."

How this aligns with our Vision: These planning efforts inform the School's decisions in order to achieve all of the overarching goals that make up the school vision. Vibrant School Community, Holistic Educational Excellence, Healthy Workplace Culture and being Regionally Present and Engaged.

- 3) Complete Prairie Hall ADA Ramp and Kinderhaus Kitchen:** These capital projects, funded by "fund-a-need" donations, are important and a priority of the school community. The Prairie Hall was built so that you either have to take stairs up to enter the main floor of the building or stairs down to enter the basement floor. An ADA ramp provides access to all children and community members to the main floor classrooms, office, and community room within Prairie Hall.

An important element of the kindergarten curriculum is preparing hot lunches. This element has been discontinued because of the need to upgrade the kitchen to a commercial kitchen to meeting Thurston County Health and Building Codes. It is very important to complete this project in order to provide lunches to the kindergarten classes but also to use the kitchen for meal preparation serving community events and festivals.

How this aligns with our Vision: Providing accessible access into school facilities and also a kitchen for meal preparation as part of our kindergarten curriculum and festivals brings the community together through education and social activities unique from other school communities, thereby supporting a Vibrant School Community and Holistic Educational Excellence.

2015-16

- 1) Facilities and Front Desk Positions to Full Time:** Our current structure contracts the Facilities Manager for maintenance, grounds keeping, janitorial, specialty work, construction, design, administration and more. This structure is unique in the education industry. For example, national averages (from the 1998 Zureich formula) for janitorial workers alone designate a minimum of 100 hours for a school less than twice our size. Our current structure allots 17 hours for this. This represents only one of the eight listed aspects in our Facilities structure. Numbers for Administration and Maintenance show an even greater discrepancy from national averages. This expansion of hours is the ideal step toward improvements in the care and development of our facilities.

How this aligns with our Vision: Care of our facilities is vital in supporting all aspects of our vision. Healthy, pleasant and inspiring buildings and grounds provides support for work in our classrooms and for our community to flourish. Taking steps to secure greater care and development of this work is ideal to guarantee this work comes in a manner that can best support our needs.

- 2) Financial Audit, Update Policies and Procedures:** As OWS operates year after year, regular financial audits are necessary to ensure accurate accounting is being completed so that the community can have a good understanding of the financial health of the school and so that we can meet our fiduciary responsibilities. Budgetary funds should be set aside to ensure an outside accountant can be hired to conduct a financial audit on a regular basis. In addition, policies and procedures are in constant need of review, amendment, and development to be reflective of current laws, consistent with other policies and reflective of current events.

How this aligns with our Vision: Regular financial audits and policy and procedure updates ensure that a Healthy Workplace Culture can be fostered and maintained by clear and current administrative policies that provide clear direction and understanding. In addition, maintaining accurate accounting helps show where financial resources are being leveraged

and makes it possible to be even more strategic and efficient in the school's financial planning, which supports a Vibrant School Community and Holistic Educational Excellence.

- 3) Prairie Hall Restoration Continued:** Utilizing grant funding and additional sources we will continue to serve as the successful stewards of our historic building. We will be in the final stages of ensuring all interior and exterior painting is both aesthetically pleasing and ensuring that all lead paint is successfully encapsulated. Missing and broken trim work will be addressed. This will be done with an eye toward celebrating the 100th anniversary of our beloved Prairie Hall.

How this aligns with our Vision: Our historic structure has brought us local, regional and state recognition. Serving as healthy stewards to this fine historic structure will serve all aspects of our vision.

2016-2017

- 1) Development and Human Resource Positions Increased: (CHRISTY?)**

How this aligns with our Vision:

- 2) Develop Wage Benchmarks in Relation to Market Data: (CHRISTY?)**

How this aligns with our Vision:

- 3) Middle School and Kinderhaus Projects Finished :** Our Middle School and Kinder Haus were wonderful additions to our campus and community. Both opened on schedule and met all necessary requirements. However, there is work that can be done to improve these facilities. Predominantly corners were cut on finish work. Trim, painting and other details that receive additional support will help enliven, stabilize and add efficiency to these structures.

How this aligns with our Vision: These efforts will aid in developing a vibrant school community and healthy work place. It will help in supporting our faculty to provide a holistic educational experience.

2017-2018

- 1) Registrar and Custodial Staffing Increases:** Our current structure allocates 17 hours per week for custodial needs. Industry standards, according to the Zureich Formula from 1998, show schools of our size designating 55 hours per week. We currently provide no cleaning services in the classrooms and perform only a cursory cleaning during the week.

Vision: This would contribute to Holistic Educational Excellence by allowing teachers to have the time to create a more balanced day with a greater variety of learning opportunities. In addition, this will aid in a healthier environment.

- 2) Develop Retirement Program: (CHRISTY?)**

Vision:

- 3) Explore Community Facility and Alternative Power:** We will analyze the cost effectiveness of adding solar power on campus. This could be done in combination with future building expansion.

Vision: This would aid in making our school more regionally recognized.

Conclusion: A Strategic Plan Revisited

To know ourselves, our desired direction, and the means to fulfill our journey and create a healthier institution is the ultimate achievement of this Plan. As the previous pages show, we have reconnected to our Mission and Vision, listed goals and objectives, and defined ways to make it happen. Through this work we strive to identify our strengths, weaknesses, challenges and opportunities in order to provide the Olympia Waldorf School with greater educational opportunities for its students. But what is to follow? How do we keep the spirit of the Journey alive for present and future members of our community?

The key lies in periodic evaluations and assessments of our work. We must revisit the Plan at key times of the school (e.g., during our school's January evaluation process and June review). We must provide opportunity for feedback from all branches of our community. We must continue to seek out information and data that will help us update the Plan. And we must continue the process of strategic planning at year's end through extensive observations, feedback, and insight from our school leadership.

It is in this vein of work that we hope to improve our school's endeavors and ensure its success, while fostering a new level of appreciation of and gratitude for the sacrifice, effort and achievement that bless us with the Olympia Waldorf School.

Appendix A

**2003 8-Year Plan- Summary of Goals, Actions and Status as of
01/25/2011**

8-YEAR PLAN (2003) - status as of 1/25/2011	Done	In-Process	Not Started	Approach Changed	Notes
Educational Distinction					
Teacher Education: more professional development funding, develop teachers from our community, more mentoring, attract experienced faculty	X				Improved in each area, but more can always be done
Special Needs Support: establish assessments & learning plans, form EST, establish reading & math tutoring, curative Eurythmist, therapeutic educator, collaborate with Takacs & Handle, increase training funds, recruit lecturers		X			
Strengthen Specialties: full-time Eurythmy, 4 part strings, upper grade electives, expand games/movement, handwork teacher 1-8, language staff training				X	Budget reductions changed priorities
Educational Standards & Eval Tools: develop guides for reading, math, language arts, music, benchmarks for each grade, guidelines for parent-teacher conferences and year-end reports, optional mid-year reports		X			Some work on reports done, recent
AWSNA Sponsored: investigate accreditation, seek advisors who can work with OWS and deepen Anthroposophical foundation		X			
Spiritual Nourishment					
Articulate Philosophy of Leadership: groups articulate spiritual task, biannual board/faculty meetings, Servant Leadership model, Collaborative Leadership conference, community service for upper grades, develop college, stop requiring parent service hours		X			Mostly done, Leadership Conference? Faculty/Board mtgs?
Develop/articulate Anthroposophic Foundation: initiatives in the community, relationship with Seattle branch of society, "talking points" about Anthroposophy, membership with AWSNA, faculty grounded in anthroposophy		X			Many aspects in process, but is this still a focus?
Sustain Spiritual Vitality: parent workshops, faculty/parent library, renewal up to .5 of salary, enliven festivals and incorporate adult events, develop campus to enhance social life				X	On-hold due to budget or just going another direction

8-YEAR PLAN (2003) - status as of 1/25/2011	Done	In- Process	Not Started	Approach Changed	Notes
Building Community					
Reach Beyond OWS: East Olympia annual appreciation gift, affiliations (TESC, OFC), Faculty presentations/lectures in community, increase attendance at child-appropriate community events, raise sponsorship participation, strengthen grantor relationships		X			Most specifics done. Grantors & affiliations policy being pursued
Grow OWS: complete Kinderhaus, enrollment focus, strengthen education, educate community about volunteer hours needed for success, fine-tune curriculum faire, improve "new parent" orientation, heighten Grandparents Day, volunteer appreciation		X			Mostly done. Orientation & volunteer apprec. programs dropped
Build Beneficial Partnerships: upper grades extracurricular program with community elders, alumni giving program, strengthen parent association leadership			X		
Gathering Space: strategic plan for large indoor space			X		
Site Development (see Site Master Plan)					
Establish Kinderhaus Facility & landscaping	X				
Optimize classroom & Specialty Space: bamboo floors in MS, cubby upgrades, hall exhibits, O&M program for class space, topographical site survey		X			
Preserve/enhance Historic Site: Signage, upgrade communications/alarm, comprehensive O&M plan, upgrade lighting for safety, inside addition design		X			Communications, alarm, and comp. plan work still needed.
Enliven Outdoor Space: upgrade sheds and compost, upgrade playground equipment, improve walkways, develop unique Waldorf site elements, biodynamic garden methods and supplies, upgrade fields, comprehensive O&M plan for grounds, farmyard/animal space		X			
Classroom Optimization, Phase 2: Special use permit projects complete, inside addition, upgrade mechanical systems, energy efficiency program, upgrade storm water drainage, social hall design			X		Very little done
Classroom Optimization Phase 3: Social Hall (replace echohaus, gymnasium, Eurythmy, music, woodwork, handwork spaces), Replace windows and doors for efficiency, greenhouse, upgrade parking, upgrade drainage, assess future site development			X		

8-YEAR PLAN (2003) - status as of 1/25/2011	Done	In-Process	Not Started	Approach Changed	Notes
Economic Strength					
Strengthen Faculty/Staff Compensation Package: yearly COLAs		X			
Increase/Stabilize Enrollment: steady growth to 200 in 2010, understand/curb negative attrition, comp. enrollment plan with resources allocated		X			
Eliminate Reliance on Fundraisers to Balance Current Year Budget: remove spring fundraiser from operating budget				X	Reduced budget amount required of fundraisers total.
Strengthen Sound Fiscal Policies: establish capital and operating budgets, manageable debt load, prudent line of credit use	X				Policies not complete, but specific items complete.
Strengthen financial ties to Greater Puget Sound: philanthropic ties, increase grant funding of specific programs		X			Auction sponsorships increased, grants just now being pursued again.
Keep Long Range Plan Alive: Development Committee & Board relationship, monitor actual progress on plan, orient new parents/faculty/staff to the plan, update plan to reflect current realities and evolving goals (every 2 years)				?	Not sure how long - range plan relates to work done on the strategic plan.

Appendix B

2005 Strategic Plan- Summary of Goals, Actions and Status as of 01/25/2011

STRATEGIC PLAN (2005) Status as of 1/25/2011	Done	In-Process	Not Started	Approach Changed	Notes
Public Relations					
1.1 Create Enrollment/PR position	X				
Organizational Infrastructure					
2.1 Revisions of bylaws and policies		X			Bylaws done, policies incomplete
2.2 Outline leadership, streamline procedures & documentation				X	Methods changed
2.3 Communicate to OWS community the decision-making structure				X	Several aspects completed but structure changed
Academic Standards					
3.1 Increase resources for student needs (tutoring, study space, special needs resources, sensory workshop, space for specialties)		X			
3.2 Academic benchmarks for grades 1-8			X		Gradalis standards purchased
3.3 Research assessment tools			X		Dependent on 3.2
3.4 Assessment tools, documentation of intersection with Public Education			X		Dependent on 3.3
Capital Assets					
4.1 Analysis of Kinderhaus and Inside Addition, decide on projects	X				
4.2 Development and Site Committees develop capital budget proposals for following fiscal year	X				
4.3 Review and improve allocation/tracking of capital funds	X				
Enrollment					
5.1 Hire Enrollment/PR Coordinator	X				
5.2 Form an enrollment/PR Committee				X	Abandoned, ineffective
5.3 Define full enrollment, taking into account space		X			
Institutional Self-Knowledge					
6.1 Statement of who we are and who we can serve			X		
6.2 Path of visible study of OWS biography (2005-06)	X				Need to do again
6.3 Strengthen OWS as a "Learning Community" (climate of gratitude, structure to review events, relate Jan. eval to strategic plan, update strategic plan in year-end review)		X			
Fundraising					
7.1 Complete database clean up		X			
7.2 Strengthen Development Committee				X	Refocus on events
7.3 Explore professional grant writer services		X			Trying volunteer
7.4 Develop annual campaigns		X			Annual events set, no detailed plan
7.5 Develop fundraising strategy for capital and operating needs					
7.6 Coordinate with other nonprofits to raise funds (i.e. Harlequin)		X			Not sure about Harlequin event but

					working with nature conservancy
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Appendix C

Major Recommendations from AWSNA Visiting Team

Report Visit Dates: October 16-19, 2011

Major Recommendations

The AWSNA visiting team recommends that the Olympia Waldorf School...

1. Consider prioritizing the establishment of a second 5-day kindergarten for the 2012/13 school year. (Shared Principle B2, C9)
2. Board actively engages the entire school community in a deliberate and achievable strategic planning process. This process defines both a vision for the school and also a realistic set of action steps for the school to implement in the next 3 years. This process also includes a comprehensive financial 3 year plan that reinforces the strategic planning initiatives, action steps, and the movement towards full enrollment. (SP C5, C11)
3. Board develop and implement a plan for increasing income – tuition, fees and forms of non-tuition income – that tangibly reflects the value of Waldorf education in the Olympia community. (SP C9, C14)
4. Strengthen the work of the Board through nonprofit board education, training, development, and mentoring. (SP C3, C4, C10)
5. Engage in the rebuilding of the delivery of the full curriculum through the addition of specialty teachers. (SP B1, B2, B3, B4, B5)
6. Build an administrative staffing structure which will ensure that the role, job description, responsibilities and tasks of each individual position are reasonable and sustainable in support of and service to the school and each individual administrative staff person. (SP C4, C5, C6, C11)
7. Board creates a plan for compensation increases for faculty and staff. (SP C4, C11)
8. Finalize and carry out plans for landscape design and rhythmic, biodynamic care of the site in order to build and hold the energetic sense of the campus as a complete, united entity in both the energetic and physical sense. (SP C8, C9, C11)
9. Consider an increase in overall expectations of students to better meet the inherent capacities of the 5th through 8th grade students. (SP B1, B2, B3)
10. Deepen the faculty's understanding of their own capacities - and thus those of the 5th through 8th grade students - by furthering their knowledge of what can be expected in terms of the delivery of increased subject content and therefore student output. (SP B5, B6)
11. Create a plan that embraces school-wide student assessment techniques and record-keeping methodologies. (SP B7)

Draft 10-05-2014