



A K-8 PUBLIC CHARTER SCHOOL  
INSPIRED BY WALDORF EDUCATION

# **Strategic Plan**

## **2014-2020**

Approved by the  
Board of Trustees  
April 9, 2014

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## Welcome from our Principal

It was just before the turn of the last century that a small group of teachers and parents had a dream for their children and for all families living in the greater Sacramento area. Their dream was to open a public charter school inspired by Waldorf education. As a result of countless hours of thoughtful planning and downright hard work, they made this dream a reality with the establishment of Golden Valley Charter School. Over the last 15 years, teachers, parents, staff and community members have continued to work in partnership to grow our small school—which started with 40 students—into a two-campus school with more than 440 students!

From these grassroots beginnings, Golden Valley has become a leader in the movement to bring Waldorf education to the public sector. Fledgling schools call us for advice about how to start their programs. Emerging schools partner with us to share positive practices and lessons learned. Meanwhile, we continue to learn from our own journey as our programs continue to flourish. A Waldorf-inspired education is based on a passion for lifelong learning, and we endeavor to model what we teach in the classroom in how we operate as an educational organization.

Our success to date and into the future is built by our dynamic community. Our teachers and parents work together on the Board of Trustees to govern our school guided by the values of Waldorf education. Our active Parent Circle has engaged the community to volunteer countless hours in and out of classrooms to support class plays, events and field-trips; provide parent education; host seasonal festivals and celebrations; and create a strong base of advocacy for educational choice. Our Golden Valley Educational Foundation, a non-profit, parent-run organization, has worked tirelessly with our community to raise extra funds to supplement our enriched curriculum and support our teachers to receive their Waldorf Teaching Certifications. As a result of this dynamic community, our teachers are better able to provide our students with a well-rounded Waldorf education. Ultimately, our students graduate with a passion for learning and well-prepared for life.

Now in our 15<sup>th</sup> year, teachers, parents and administration have worked together again to create this Strategic Plan for our school. Several years ago, our Board of Trustees created our 2020 Vision. This plan builds on that vision and provides a clear roadmap to our future. I look forward to continued partnership among parents, teachers, administrators, and of course, our students as we grow and invite you to be a part of our continued success as a public charter school inspired by Waldorf education!

*Debi Lenny, Founding Principal*

## Methods and Acknowledgments – Who Created This?

How we created the strategic plan is arguably just as important as what it says. We knew that we needed to honor the values and intent of our community and the Waldorf educational process in how we co-created a vision for our future.

The GVCS Strategic Plan was created through a collaborative, organic, and dynamic process. The Board of Trustees tasked the Principal and Business Manager with building on the 2020 Vision to update and clarify the road map for achieving that vision. A volunteer Strategic Planning Core Team of parents, educators, and employees was convened from a cross section of the school. They contributed well over 200 hours of thoughtful insights to create this plan.

We leveraged a professional Strategic Management methodology to systematically and holistically co-create our plan. We hosted two Community Open Forums to get broad input on trends in our environment and collectively craft how we want to respond. We progressively tested a series of iterative drafts of all Strategy Map components with the community through meetings with Parent Circle, Faculty Circle, GVEF, and even directly from our primary customer – the students through the Student Council. We got input from external stakeholders as well. Based on this co-crafted long-term Strategic Plan, we then developed more robust implementation plans and dynamic management practices to clearly prioritize our choices taking into consideration our precious people and financial resources.

We progressively reviewed the drafts as they emerged with the Board of Trustees. We formally presented the Team's unanimous recommendation for the Board to make further edits, approve and implement as the Board chooses.

We thank the volunteer Strategic Planning Core Team Members:

- Eric Walder, Chair, Board of Trustees
- Deborah Lenny, Principal
- Andy Silvert, Business Manager
- Allie Litton, Grades Teacher
- Barbara Ames, Grades Teacher
- Tavia Pagan, Kindergarten Teacher
- Claire Toney, Parent, Parent Circle Chair
- Monica Eisel, Parent, GVEF President
- Lynne Tweten, Parent
- Coral Cavanagh, Parent
- Lee Scott, Parent, GVEF Treasurer, Strategic Plan Facilitator

## Waldorf-Inspired Public Charter Education – What Does that Mean to Us?

The underlying premise of our approach at Golden Valley is that effective education is the critical factor in determining the future of humanity. We seek to provide our students with every opportunity to develop all the necessary skills they will need as adults to develop their full potential, to enable them to lead rewarding and meaningful lives.

We actively support them in discovering and developing virtues such as integrity, joy, creativity, service, collaboration, resilience and excellence. We know that education must serve the needs of the whole society as well as those of the individual, and that these two goals cannot be seen as separate. Education is an essential ingredient to forming a civil society where people work together in a spirit of cooperation and freedom for the common good, and a well-educated citizenry is a vital prerequisite to developing and maintaining true democracy. The future for which we seek to educate our children is unknown to us—Our students will not only need to be able to navigate the world of the future, but they will be active builders of that same world. It is our task to ensure that they are intellectually, emotionally, and physically prepared to successfully navigate the many challenges that life will hand them.

We are Waldorf-inspired because we believe the Waldorf approach most effectively prepares our students for a lifetime of learning.

We embrace as a central premise from the Waldorf pedagogy that we all have within us three fundamental forces impelling us toward physical, emotional, and mental activity. Our holistic approach integrates the education of the head, heart, and hands. Effective education also takes into account the child's developmental maturity across these three capacities at every grade level. Balance and timing are critical if each of these areas is to serve and complement the others. *Thinking, feeling, and willing* need to work together as a team.

At Golden Valley we develop *thinking* by teaching children to observe objectively with wide-awake curiosity. We do this at all grade levels by bringing the child's attention to phenomena around them that would normally escape notice, encouraging them to keep their questions alive and open rather than rushing to premature judgments. By using storytelling as a teaching tool, we engage the imagination and feeling life of the children in harmony with the thinking. Our goal is to develop in children the habit of lifelong learning. When imagination, curiosity, and objective attention are combined, new answers emerge from complex questions.

A crucial task of a complete education is to develop the qualities of the heart, along with the head and the hands. To do this we integrate the arts in every part of the day—singing, movement, drawing, painting, story and drama—with our content-rich curriculum as the focus. We incorporate developmentally appropriate social skills and emotional intelligence that builds virtues such as respect and collaboration. We expand the definition of classroom beyond four walls into natural resource treasures on and off campus. The deep synthesis of feelings in our holistic education nourishes, harmonizes, and connects the children to each other and their surrounding world.

We develop will forces in our students by allowing them many opportunities to experience rhythm and repetition in their lives and by gently helping them to develop good habits in everything that they do, from tidying up after play, to caring for tools, to pushing in a chair. Our curriculum throughout the grades provides ample opportunity for students to build will forces through conscious movement, practical activities, handwork, musical and artistic expression, and by creating their own textbooks (called main lesson books), carefully illustrated and hand-written in their own words. By developing a healthy will force, our students learn to productively channel their thinking and feeling skills to navigate a dynamic and often challenging world.

As a charter school, we are advocates for educational innovation and choice. Curiosity, experimentation and innovation are inherent to a Waldorf education. As a result, we also incorporate other complimentary educational methods to enrich our curriculum. We enjoy the discovery of trial and, yes, sometimes error of learning as lifelong students ourselves. We believe we should model the way for a lifetime passion for learning both internally for our students and externally as leaders in the charter school movement.

Because Golden Valley is a public school, we receive general funding from tax payers. This allows us to serve a diverse socio-economic student population. We have aligned our curriculum to meet the California Common Core Standards. Our rich Waldorf curriculum, which is both broad and deep, goes beyond meeting the State of California's content requirements. Because our curriculum is based upon developmental stages of childhood, the timing of when various skills and content are brought to the children is not identical with the Common Core Standards, but by the end of the 8<sup>th</sup> grade all standards are covered, including the standards that address technology. Our students graduate from Golden Valley well equipped for success in high school and, more importantly, for a lifetime of learning and contributing.

Waldorf Education was beautifully designed to foster balanced growth, academic excellence, and healthy human development in children, while providing educators with a well-defined curriculum and pedagogy to help them achieve these lofty goals. Over the past century, this approach has withstood the test of time. For this reason we consider that Waldorf-inspired public education, available to all children regardless of socioeconomic conditions, and delivered through an innovative charter organization is a model of education that truly addresses the educational needs of today's children for tomorrow's civilization.

## Our Heritage – Where Have We Been?

Golden Valley Charter School (GVCS) originated in the minds and hearts of a handful of home-schooling parents. These parents came together during the 1998–99 school year with the idea of pooling their resources and talents to educate their children in a cooperative environment. As part of the cooperative, two retired Waldorf teachers were hired to work with the children and parents. At the same time, a parent wrote our first charter, the *Charter of Citrus Heights Charter School*.

With a staff of four Waldorf teachers, a part-time administrator, a part-time business manager and an extremely supportive group of parents, Citrus Heights Charter School opened its doors to 45 students in Kindergarten through 5<sup>th</sup> grade on September 11, 1999, as a locally funded charter school authorized by the Twin Ridges Elementary School District. The Charter Council (now known as the Board of Trustees) clearly defined the school's central purpose and focus: to provide a curriculum inspired by Waldorf education available to public school students in kindergarten through 8<sup>th</sup> grade, thus providing families from all socioeconomic backgrounds access to an education previously available only at expensive private schools. Our community also voted to change the school's name to Golden Valley Charter School.

During the early years, our classrooms were spread across the facilities of three different local churches. Every few years since then we moved our physical location to adapt to changing circumstances. Due to a change in charter school law, GVCS left Twin Ridges School District and became authorized by the San Juan Unified School District (SJUSD) in 2007. We have worked very closely with SJUSD to become an educational partner and meet the housing needs of our growing school. During that time, we have inhabited five SJUSD facilities including our current Palisades campus. In the 2014-2015 school year we will create a Kindergarten through 4<sup>th</sup> grade "sister" campus at the Filbert campus just a few miles from our Palisades campus. Each year, a new grade will be added until the Filbert campus is also serving students from kindergarten all the way up through 8<sup>th</sup> grade.

The establishment of Golden Valley Educational Foundation (GVEF) in 2001 has been instrumental in supporting our school. GVEF, which includes our Parent Circle, leads our community to volunteer in and out of the classroom and raise funds for our school. The generously donated time and money makes our holistic curriculum possible and provides scholarships for our teachers to continue their Waldorf education. Last year, twelve of our teachers graduated with Waldorf Teaching Certificates from Rudolf Steiner College (RSC). Four of these teachers are currently in a Masters Program at RSC. Additionally, five of our teachers are currently enrolled in Waldorf Teacher Training at RSC. In addition, GVEF provides partial scholarships to kindergarten and class teachers for the summer Art of Teaching workshops so they can prepare for the next grade level and to all staff to attend the annual Alliance for Public Waldorf Education Conference.

In 2013-2014 we marked several special achievements. We celebrated our school's 15<sup>th</sup> Anniversary with a Gratitude Gala and our first evening Winter Concert, which was attended by 1,400 guests. We reached an enrollment of 444 students, supported by 75 teachers and staff. In June of 2014, we graduate our tenth 8<sup>th</sup>-grade class, adding to our growing alumni of nearly 200 students.

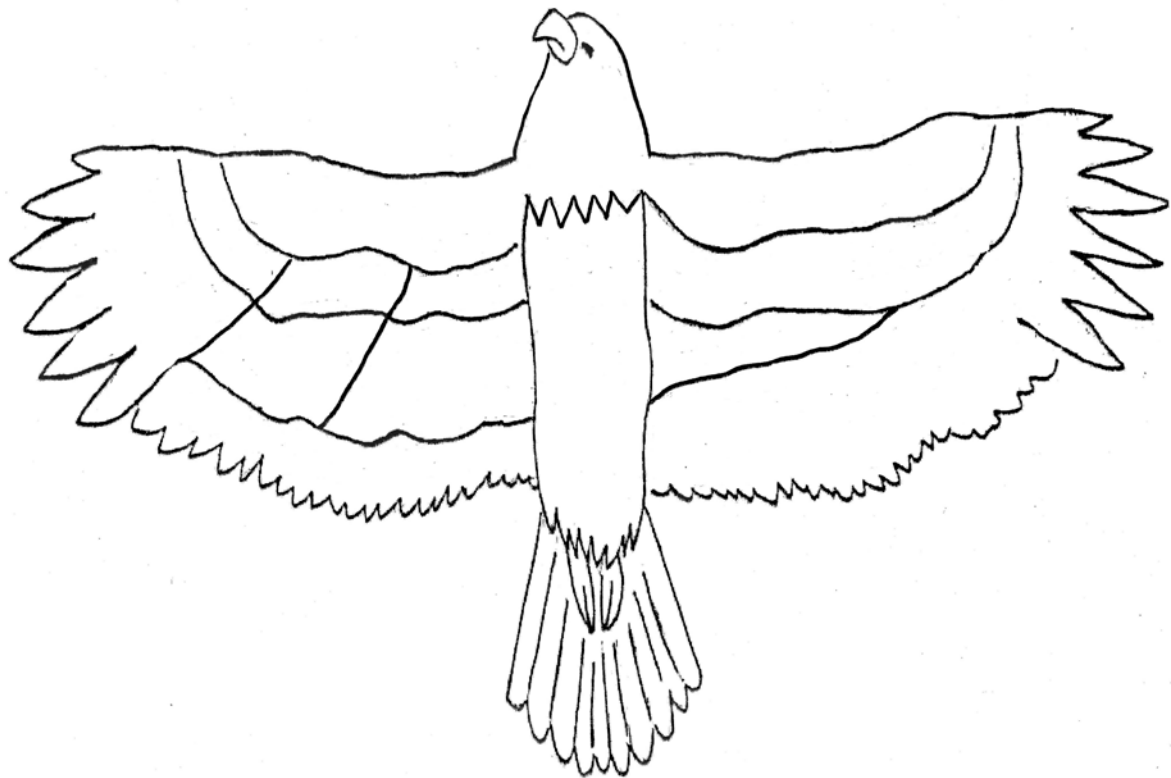
Over the past 15 years hundreds of families have contributed to and gained from the experience of being members of our learning community. As a community, we have made many changes and overcome many challenges. We've successfully renewed multiple charters across different school districts, superintendents, economic crises, and other scrutiny. Every year, our student body grew as we were able to offer the benefits of a Waldorf-inspired education to new families that shared a similar passion for a more holistic educational choice. Every year, we welcomed new employees and volunteers, while we said goodbye to graduating students, families and colleagues who moved on to their next stage of life. Each year we experimented with ideas and celebrated the learnings from both our mistakes and successes.

With each change, our committed community has succeeded by working together with creativity and compassion to make the most of any situation. Our resilience stems from our clarity of purpose – to prepare our students for a lifetime of learning. We are not strangers to change, and we look forward to continuing to learn and adapt our strategies while staying true to our principles as a school inspired by Waldorf education.



## **Our Community – Who Are We?**

Golden Valley is a vibrant learning community of forward thinkers, open and enthusiastically moving toward a better future for public charter schools. Students, staff, teachers, administrators, and parents work together purposefully and respectfully, developing long-lasting and productive relationships. Teams of like-minded individuals work with care to produce outcomes beneficial for our children now and in the future. Developmentally appropriate education is at the heart of all our decisions and drives our speech and action in every encounter.



### **Eagle's Heart**

Our Students - The heart and body of our school is our students. All of us are entrusted as stewards to responsibly educate every one of them from the inside out from Kindergarten through 8<sup>th</sup> grade. They are the reason we are here.

### **Eagle's Head**

Our Board of Trustees - This group serves as the formal stewards of our school. They govern the school by approving plans and policies, and overseeing the administration of the school. They are represented by the mind and eyes of the eagle—keenly and thoughtfully managing the present and seeing clearly where we want to go as a school. The Board is composed of volunteers representing a blend of members from the community, the administration and the faculty.

Our Principal - Our principal is the formal leader of our school who orchestrates all other school community leaders to collaboratively achieve our Mission, Vision, Values and Goals. She is represented by the beak of the eagle—calling out a cadence for the wings and the tail feathers to work in unison to give flight to the student body. Ms. Lenny has proudly served in this role since our founding. She is responsible for engaging the employees and volunteers of the entire school community to deliver an excellent educational experience for our students.

### **Eagle's Wings and Tail**

Our Faculty - Our teachers and educational support specialists form one of the wings that uplift and inspire our students to greatness. They are professional educators, dedicated to delivering an amazing Waldorf educational experience. Guided by the principal, they work together with each other, the administration, and families to bring us closer to our vision, one school day at a time.

Our Families - Our school is just one part of our students' education. Our students' families are their first teachers. Working together with the faculty and each other, families represent the other wing that makes it possible for our students to soar. Our families include the parents, guardians, siblings, grandparents, extended relatives, and dedicated caregivers.

Our Administrators - Our office employees make it possible for our school to exist and run smoothly. They provide precision operational expertise to navigate the byzantine legal, financial, and physical requirements of school life. As such, they are represented by the eagle's tail feathers, acting as a rudder to translate the power of our wings into a graceful flight towards our vision.

## Our Future – Where Are We Going?

We illustrate our future with a summary Strategy Map. It summarizes our Mission, Vision, Values and Goals, and shows how they relate to each other.

From the bottom up, it reads: “Our Core Values define how we will interact with each other as we work through our Rhythms and Projects to optimize our Strategic Goals to achieve our Vision in service to our Mission.”

From the top down, it reads: “Our Mission tells us why we are here, and our Vision describes where we are going. We assess our progress towards that Vision by optimizing the balance across our five Strategic Goals. We achieve those Goals by performing our ongoing Rhythms and delivering Projects. Our Core Values define how we interact with each other along the way.”

(Note: This diagram is for content only. A more organic artwork is being rendered by a member of our community.)



This map illustrates our commitment to our students and each other to purposefully create our future.

## Our Mission – Why Are We Here?

Our mission reflects our shared commitment to the primary reason we exist as an organization. There are many things that we do as an educational community. Our mission does NOT try to summarize what or how we do it. Our mission defines why we are here to help us to focus on those things that will have the greatest benefit towards that purpose. This is our compass. Our mission provides stability of our purpose over the long term, even as our specific strategies and methods adapt in the short term to navigate changing conditions.

**Our Mission:** We prepare our students to consciously engage with our evolving world by inspiring a lifelong passion for learning.

Our mission is not just the purview of the teachers or students in the classroom. Our entire community, including all employees and all volunteers, serve as educators towards this mission. The way we speak and how we act shows as role models. We contribute our time and our donations directly in classrooms and on the playgrounds. We contribute indirectly by making the campuses safe and well equipped and by supporting the teachers and volunteers who are working directly with the students. It takes all of us working together every day to make this mission a reality.

## Our Vision – What Will We Look Like?

Our vision paints a clear and compelling future that we are excited to create together. It illustrates what we will look like when we arrive in 2020.

**Our Vision:** We are a leading network of Waldorf-inspired public charter schools.

We recognize our role as a leader, among a growing number of others who are courageously pioneering innovative educational choices. We know that we can't do this alone, so we collaborate as a network of schools. We aren't waiting to implement best practices. We are experimenting to create better practices. While we see many changes, we remain steadfast in our commitment to our core identity as a Waldorf-inspired public charter school.

## Our Core Values – How Will We Interact with Each Other?

The foundation of our Strategic Plan and the very fabric of our community is our set of shared Core Values. A value is a commitment to a behavioral standard or social norm for how we will interact with each other. There are many values that we welcome on our campus. Our Virtues program introduces a noble value each month as a way to expose our students to proven values and refocus us as a community. We welcome the diversity of all of the values of the Virtues program, and all other complementary values.

There are a few values that are prerequisites for being a member of our community. By choosing to be a member of our community, in ANY role, we commit to holding ourselves and each other to striving for these values in every interaction. None of us is perfect. We will fall short of these values at times. When we do, we gently remind each other and get back on track.

We respect that not everyone will want to commit to these values. In those cases, we will respectfully ask that those folks join another educational community that works better for their values. This is the beauty and power of the public charter school movement. There are many schools to choose from and we are grateful for the freedom to choose these values for our school.

### **Developmentally Appropriate Learning**

We believe in educating children from the inside out, using known research on child physical, emotional, and mental development. We protect the natural progress of childhood through appropriate unfolding of academics, assessments, technology, media, values, play, and social functions.

### **Respectful Relationships**

We are willing to be mindful of others in our community, most importantly children, to compassionately build honest relationships and appreciation of diversity.

### **Joyful Service**

We freely participate, share, and contribute with enthusiasm. We willingly share our time, our talents, and our donations to serve our students and others.

### **Cultivating Excellence**

We do our best, giving careful attention to every task and relationship. Excellence is an effort guided by a noble purpose. Cultivating excellence does not mean perfection. It means cultivating your gifts to their fullest potential through continuous learning and improvement. Excellence is the key to success.

### **Resilience**

We remind ourselves to stay true to our purpose and values as we evolve through adversity. Resilience is hopeful patience. It empowers us with strength and agility that comes from being both steadfast and flexible. It helps us adapt in a purposeful way through continuous changes in our environment.

## Key Environmental Trends – What’s Going On Around Us?

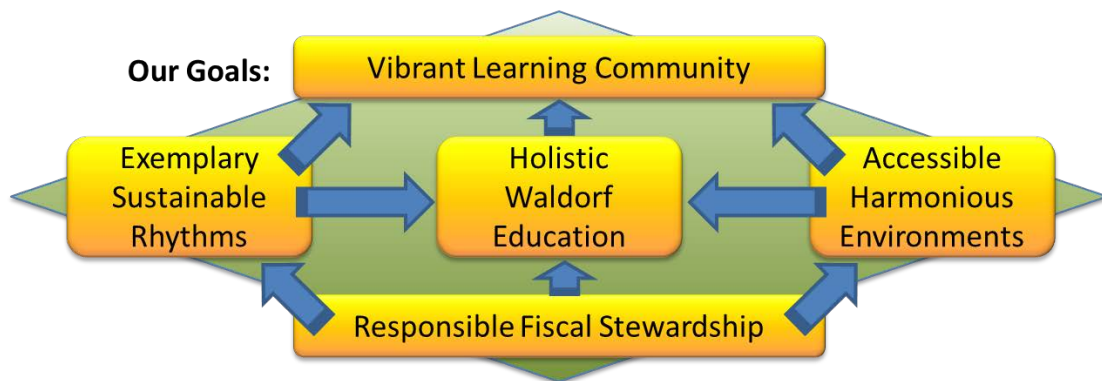
We don’t live in a vacuum. Our world is constantly changing. Our strategies must be formed with an awareness of trends happening around us, so that we are able to adapt to changes. Below are highlights of the trend assessment made by the Strategic Planning Team with broad input from multiple open Community Forums. See Appendix for more details.

What are the critical questions for how we should best adapt to the evolving Social, Technological, Economic, Ecological, Political, and Educational trends?

- How do we prepare our students with modern 21<sup>st</sup> Century skill sets through our “head, heart, and hands” approach and nurturing environment that sets us apart?
- How do we manage our growth as a school in terms of students, facilities, operations, and support in a healthy and sustainable way?
- How do we integrate the Common Core standards in alignment with our Waldorf methods?
- How do we manage the risks of premature media exposure while integrating technology in a useful fashion?
- How do we deal with an increasing number of students with behavioral, health and academic special needs?
- How do we engage our parents and teachers in a partnership to embrace differences and develop skills for collaboratively solving problems?
- How do we ensure our long-term financial solvency in the face of uncertainty and possible future budget reductions?
- How do we support and develop our teachers and staff so they are best able to make a difference for our students and our community?

## Our Strategic Goals – What Outcomes Will We Achieve?

Our Strategic Goals describe the five long-term, ongoing outcomes that we commit to creating with our community. These five Goals are interdependent. We cannot completely jeopardize any one of them without jeopardizing all of them. At all times, we must maintain a minimum threshold level of performance across all goals. However, in any given year, specific challenges may require that we shift the balance of our focus more heavily towards some goals with a temporary sacrifice of other goals. By adapting to changes in a holistic fashion, we can best optimize the balance of all goals in the long run.



We begin with people first. All the other goals contribute to creating a **Vibrant Learning Community**. All of our diverse members—from students and families, employees and volunteers—work together as a unified team in alignment with our shared passion for lifelong learning and a few core values.

As a school, our primary purpose is education. For us, we emphasize delivering a **Holistic Waldorf Education** as our preferred method for developing the whole child from the inside out.

Creating and **Sustaining Exemplary Rhythms** ensures that our administration, special events, and natural daily and seasonal processes flow smoothly and efficiently. This allows us to focus on delivering a great Waldorf education and helps our community to maintain morale and sustain their level of engagement.

We want to inspire learning through all the senses in **Accessible Harmonious Environments**. This includes safe, beautiful, and nurturing classrooms, campuses, facilities, gardens, and surrounding natural spaces. We are also physically and geographically accessible to Sacramento area families that want a public Waldorf experience.

Being **Responsible Fiscal Stewards** is a foundational goal. It is a prerequisite for even existing as a solvent, publically funded institution. As stewards, we wisely invest the public money from the State and our donors in a transparent and accountable fashion. This enables us to deliver a Holistic Waldorf Education, operate with Exemplary Sustainable Rhythms, and learn in Accessible Harmonious Environments.



For each strategic goal, we have a specific long-term definition. We also have medium-term objectives to guide our prioritization of choices over the next 12-18 months. We expect that the objective will be updated by the Board of Trustees each school year to reflect shifts in trends.

### *Vibrant Learning Community*

**Definition:**

We are a unified mosaic of diverse students, families, employees, and volunteers committed to fostering healthy learning opportunities for all. We build meaningful relationships sustaining our shared lifelong passion for learning and growth.

**Objectives:**

- Grow a cohesive team of long-term, continuously learning employees and volunteers.
- Educate and unify our diverse community around a shared vision and core values.
- Offer more opportunities for social interaction that strengthens our relationships.
- Expand public access to Waldorf education to more families.
- Increase the diversity of our student population.

### *Holistic Waldorf Education*

**Definition:**

We inspire and educate our students by providing a Holistic Waldorf education that enhances the head, heart, and hands. Our highly qualified educators deliver a comprehensive and integrated curriculum. Within a collaborative atmosphere, main lessons and specialty classes are taught to our thriving community of learners. As early advocates of public Waldorf education, we continue to be leaders in the growing Waldorf charter school movement.

**Objectives:**

- Provide a continuously enriching Waldorf curriculum that encompasses the head, heart, and hands of each learner.
- Demonstrate academic performance through assessments that align with our Waldorf principles for each grade level.
- Enhance our students' joy for going to school and learning social skills.
- Expand our suite of specialty classes (languages; gardening for lower grades; music, games, and eurythmy; nature walks/outside exploration).
- Support and grow Education Support Services including academic, behavioral, and mental health.
- Reduce teacher-to-student ratio.



## *Exemplary Sustainable Rhythms*

### **Definition:**

Our school operates effectively, efficiently, and comfortably. Employees and volunteers conduct our educational and administrative responsibilities at a sustainable pace. Our daily and seasonal rhythms foster a positive learning experience. We demonstrate exceptional ability to meet operational needs in service to our community. We prioritize our goals and objectives and measure our success.

### **Objectives:**

- Recruit and retain a highly skilled team of employees and volunteers.
- Invest continually in the training of our teachers.
- Achieve a high level of services on a larger scale.
- Ensure that service levels are consistent and seamless across all campuses.
- Verify that our capacity to deliver services can accommodate expansion before expanding further.

## *Accessible Harmonious Environments*

### **Definition:**

Our learning environments include our classrooms, campuses, gardens, facilities, and surrounding natural spaces. Working together, we create a safe, sustainable, healthy, and vibrant atmosphere that fosters learning through all the senses. We are accessible to families in the Sacramento area who desire our public Waldorf educational model.

### **Objectives:**

- Create a growth plan that maps out our intentional, conscious growth strategy over the next 5 years.
- Continue to improve the natural environment of both our Palisades and Filbert campuses.
- Provide appropriate desks, chairs, furniture, and other needed items to meet the vision of harmonious environments.
- Improve the energy efficiency of our facilities on both campuses.

## *Responsible Fiscal Stewardship*

### **Definition:**

We maintain a healthy, balanced budget. This enables our school to achieve our short- and long-term educational and operational goals. The business team stays current on legal, political, and technological trends.

### **Objectives:**

- Operate within a balanced budget.
- Offer competitive salaries to attract and retain highly qualified employees.
- Invest our public funds and community donations wisely to achieve our vision.
- Achieve a clean audit.

## **Strategic Management – How Will We Manage This?**

Our Strategic Plan lays out our long- and medium-term map for the future. To co-create that future, we must translate this map into specific short-term actions and measurable results to monitor our progress and adapt to changing circumstances. The following tools will be used by the Board of Trustees and school leadership team to dynamically implement and manage the month-to-month efforts to fulfill our 2020 Vision.

### **Communications Plan**

This is a thoughtful plan the leaders of the school use to manage what key messages will be communicated, from whom and to whom, how, and when. This is perhaps our most important management tool. Engaging our community as we work together towards our strategic goal is the #1 factor that will determine our degree of success.

### **Project Portfolio**

This is a prioritized list of the temporary, unique efforts to change something at our school. The changes these projects implement will move our school closer towards our mission, vision, values, and goals. Those results show up as changes to our Service Rhythms and actual performance results on our Performance Dashboard. Each project is championed by a sponsor, is led by a project lead or chair, and is carried out by a team of employees and/or volunteers. The portfolio tracks our expectations and timeline, along with the budget needed to achieve our desired results. Projects are funded by the budget above and beyond the Service Rhythms.

### **Performance Dashboard (To be created in 2015–2016)**

This is a set of key performance indicators specific for each goal with targets and actuals per semester and by school year. This gives us a tool for having productive conversations about our progress and the efficacy of our actions. As a learning institution, we value setting goals, assessing our progress, and sharing feedback on how we can work smarter next time.

### **Service Rhythm Portfolio (To be created in 2015–2016)**

This is an inventory of all the classes we teach and our recurring administrative activities. This is a model of the school's ongoing operational anatomy. This clarifies what we need to do to have exemplary, sustainable rhythms month after month, year after year. Each service has an owner, is allocated resources, and has clear service expectations. As projects are implemented, they improve how we can deliver these services to our community. This portfolio ranges from educating students in the classroom, to making sure employees get paid, to ensuring volunteers are adequately screened, to paying the utility bills. All these things need to happen in a well-orchestrated way. The Service Portfolio is our master console for all of these rhythms.

### **Issue/Risk Management (To be created in 2015–2016)**

This is a prioritized list of the most significant issues and risks facing the school. We may not be able to control these, but we can influence them IF we choose to acknowledge that they exist and be proactive in addressing them. We want to be prepared for the uncertainty inherent in a constantly changing world, so that we can position ourselves to be as resilient as possible. Often, the action plans for managing the risks will spawn projects or modify how we allocate resources to our services.

# Appendix I

## Environmental Forces: Global Trends/Local Choices

Our school exists within a larger ecosystem that is always evolving. Powerful forces influence the nature and rate of those changes. We looked carefully at the dominant trends at the state and national levels. We then determined how to work locally within our sphere of influence to leverage both the desirable and undesirable aspects to ensure our school continues to thrive. We used this broader awareness to sharpen our focus in the Strategic Plan.

### Sociocultural

This category looks at the diversity of and shifts in social patterns and cultural norms. This includes trends in demographics such as population growth, diversity, shifts in social customs, cultures and languages, generational patterns, urban vs. rural, live-work geography, etc.

#### ❑ Global Trend:

Our world is becoming more diverse every day, and we expect that to accelerate. We see this across all dimensions of diversity. This is more than just age, gender, or race. We see an increasing number of different ways that people prefer to live, eat, work, think, feel, play, pray, marry, contribute, connect, and interact with each other. We see a continued expansion of social interactions into online social networks.

Unfortunately, we also see a tendency in the world to react to differences from a place of fear and hostility rather than compassion and respect. This polarizes rather than unites communities. These factors, plus the chronic uncertainty and fragility from all the other environmental forces, have a cumulative effect that heightens the stress and anxiety for many people. In turn, people default to a more adversarial than collaborative approach.

#### ❑ Local Impact:

- Parents are stressed, anxious, and pulled in many directions. This reduces the willingness to collaboratively solve problems with other parents and teachers.
- Teachers are managing a broader range of expectations and levels of support from parents and students.
- More students are exhibiting social and behavioral challenges. They struggle with peer pressure.

#### ❑ Our Choices:

We choose to leverage our diversity by educating each other from a place of love and compassion. We encourage a virtuous approach to diversity. We do not tolerate bullying in any shape towards any member of our community. We help students (and to the extent possible, parents) learn how to share our differences in a healthy fashion to increase awareness and acceptance, even when we do not agree. This is an essential skill for collaborating and innovating in a diverse and rapidly changing world.

## Technological

This includes trends in how people and organizations prefer to access, utilize, interact with, and share information as well as emerging technical solutions and threats. This is not limited to computers or the Internet. The printing press, cotton gin, postal service, railroads, medical devices, automobiles are all “technological” advances. By themselves they aren’t good or bad. They are just tools. How they are used can have a significant impact on society.

### ❑ Global Trend:

Technology of all kinds will continue to have an increasing presence in our lives. Technology is changing how we travel, heal, produce energy, buy goods, and simply make day-to-day life decisions. In particular, information technology through mobile devices and social networks is changing how we stay informed, contribute to, and connect with our community. The use of technology may be required at some extent to meet federal and state educational standards. To succeed in most careers in the Information Age, at some point students must learn how to use technology to access, share, and APPLY knowledge from a global pool using their critical and creative thinking skills.

There are huge, well-researched risks to the premature and unstructured access to media and information technology. This impairs the development of the very creative, critical, and social thinking skills that give us the power to use technology effectively. There are also opportunities to enhance the connectivity of our community, the creativity of our teachers, and even the readiness of our students if we can manage the risks and take advantage of the benefits.

### ❑ Local Impact:

- Parents increasingly rely on digital information, in particular through social networks and mobile devices, to stay informed and connected with the school. Some opinions shared on social networks have significant influence regardless of their accuracy. Parents with different media preferences can become adversarial.
- Teachers find they are competing with media for their students’ attention. Teachers could be leveraging technology to collaborate with other educators on effective teaching methods (whether the methods use technology or not).
- Most young students are exposed to media before it is neurologically or developmentally appropriate for them. Most students at all ages are exposed to too much media of any kind, which impairs their independent thinking. Many students feel unhealthy peer pressure to conform to the latest consumer gadget. Some students may be exposed to devastatingly inappropriate content. Students may have trouble determining how to analyze the risks and benefits so they can choose how to use technology appropriately.

### ❑ Our Choices:

We choose to manage the risks of technology and leverage its benefits by carefully incorporating its use in developmentally appropriate ways. We believe ignoring technology creates greater risks for our students than helping them to learn how to manage technology. We can prepare our students to intelligently apply technology without saturating them in it prematurely. We still believe in limiting media exposure of any kind especially for students in Kindergarten through 3rd grade. We still believe in limiting exposure to passive TV media and unsupervised use of any Internet enabled device from K–8. We will experiment with the gradual introduction of structured uses of information technology for the middle and upper grades. These can supplement the

educational experience and provide access to additional support for certain subjects. Rather than focusing on learning a specific technology, we will prepare our students to analyze the risks and benefits of any emerging technology so they can determine how to best apply those tools. We will more fully embrace the use of technology to connect teachers with parents, parents with parents, and teachers with other teachers across the globe.

## **Ecological**

This includes trends in our underlying biological systems. These provide the necessary air, water, energy, nutrients, temperature, and raw materials for us to co-exist on our planet with all the other inhabitants. These also provide the systems for cleaning and replenishing so our existence can be sustainable.

### **❑ Global Trends:**

There are significant risks to the underlying stability of our environment. There are strong differences of opinions as to the degree and causes of those threats, but we are clear that ignoring those threats could seriously impair our quality of life. We have a greater need for current and future generations to be more mindful of the relationship between our choices as consumers and the consequences to our personal health and the health of our communities. In California, the quality of our air, water, food supplies, and energy generation, as well as the volatility of our climate, is the focus of major public debates.

### **❑ Local Impacts:**

- Parents are becoming more vocal about their ecological opinions. This can increase awareness and advocacy. At times it can also manifest as prejudice and condescension over individual families' opinions and choices.
- Teachers are seeking to incorporate awareness of ecological issues into the curriculum in age-appropriate fashion.
- Students have an increasing sense of the environmental challenges and are seeking ways to discuss it and contribute.

### **❑ Our Choices**

We will continue to use an immersion in the natural world as a way to support the education of the whole child. We will educate our community to be inclusive, loving, and friendly when discussing different ecological beliefs. We believe this is imperative to prepare our students to make informed, sustainable choices as consumers for their personal health and the health of society. We encourage them to serve as stewards of our natural resources through dialogue of the challenges and collaboration on solutions. We inspire students to take a longer-term vision for the consequences of their decisions to future generations. We want our facilities and operations to model effective conservation practices. We want our locations to use local natural spaces to foster an interactive experience and intimate appreciation for nature.

## Economic

This includes trends in overall output (productivity), monetary supply (budgets, grants), and employment rates. It also includes which careers people are pursuing (or leaving) and how employers recruit, develop, and manage their workforces.

### ❑ Global Trend:

Economies across the globe are in a fragile and uncertain state. Many organizations are in a chronic holding pattern delaying important decisions hoping things are going to return to a more secure pattern. Unfortunately, we are likely to see more uncertainty and volatility due to rising debt, high unemployment, and shortsighted fiscal and monetary policies. At the international and national levels, this is at an all-time low. At the state level, we've seen some recent relief in the funding available to schools. We hope this continues, but we assume pressures from other spending categories (retirements, health and human services, public safety) as well as debt interest and inflation will increasingly compete with education for public funding.

In terms of careers, the modern skills of the 21<sup>st</sup> century demand much higher levels of critical and creative thinking, collaboration, rapid learning, innovation, and agility. The knowledge worker is the primary operator in the Information Age, with a strong demand for STEM careers (Science, Technology, Engineering, and Math). Unfortunately, there is likely to be a growing spread between the skills employers seek and the skills job seekers have resulting in a labor shortage with high unemployment.

### ❑ Local Impacts:

- Public funding for our school is likely to be unstable with either limits to growth or delays in payments, if not outright reductions in amount. Traditional grants have become more limited.
- Many parents are still reeling and recovering from their own fiscal crises.
- Teachers and staff are doing their best even though their salaries do not reflect the value of their contributions.
- Students need to be prepared to contribute, or even better, to create jobs. They will need the fiscal literacy to make healthy financial decisions and be responsible for their own retirement.

### ❑ Our Choices:

We choose to continue to be financially responsible at our school given the tremendous uncertainty we face. This discipline served us well through the recession and we see every reason to stay vigilant. We proudly commit to a curriculum that gives our students the holistic education they need to think creatively, critically, and collaboratively. We know our alumni will be the high performing employees and employers of the future. We see an opportunity to incorporate financial literacy into our curriculum to prepare students to be savvy and agile with their money. We will continue to partner with GVEF to leverage alternative funding sources for our school. We will seek ways to support our teachers and staff as best we can with the resources we have.

## Political

This includes trends among international, federal, state, and local governments. This considers the political priorities in the administrative, legislative, and legal activities and how those priorities are implemented through policy and budgets.

### ❑ Global Trend:

At the time of this writing, our political structures internationally and nationally are imploding. Fortunately, California state politics appear relatively stable by comparison. There is virtually no faith that effective educational solutions will come from our elected representatives. There is significant anxiety over the kinds of misguided policies and knee-jerk radical shifts in directions that can result from the chronic battle for power between the dominant political parties. The instability of our world decision-making processes is jeopardizing the ability to navigate the other environmental forces.

We see a trend towards reductions in funding for education and increased meddling in the standards for delivering education.

We see growing support for and adversity to the charter school movement. There are powerful forces lining up on both sides of the question at the state and district level.

### ❑ Local Impacts:

- While education receives good lip service, other pressures may limit or reduce educational funding.
- Allies in the charter school movement are reaching out to us to play a more proactive role in modeling and sharing our successes.
- The political climate within our district is slightly positive but still mixed toward charter Waldorf schools. That climate could change quickly.
- Many parents are further stressed and aggravated by the political dysfunction.
- Parents face uncertainty in their jobs with continued economic challenges.
- Parents who rely on public assistance programs face uncertainty in their lives.
- Teachers and staff face uncertainty with their retirement and health care benefits.
- Students have a sense of the political drama but do not know how to perceive and interpret it.

### ❑ Our Choices:

We choose to focus on our sphere of influence. We will focus on how we can best educate our students given the resources and requirements we have to play with. We will prepare our students to engage in more productive dialogue and collaborative problem solving so they can positively contribute and hopefully reintegrate our polarized communities. We will buffer our students from excessive anxiety where possible and engage them in healthy conversations about current affairs and how they might make different choices in the future. We will be a leader in the Waldorf and charter school movements by working collaboratively with our allies to positively influence political forces. Our goal is not to conquer but to provide viable alternatives to ensure an innovative educational culture for creating the methods that best serve different kinds of children.



## Educational

This is specific to our context. These are the trends in educational needs for our communities, evolving learning methods, performance assessments, and delivery options.

### ❑ Global Trend:

Never before in the history of the world has there been a greater need for people to collaborate with each other in responsible, compassionate, creative, and critical thinking ways. The skills most in demand for the 21<sup>st</sup> Century are in many ways significantly different than the skills in demand during the Agrarian Age when our society's current educational system was invented. Not surprisingly, many educational systems are catastrophically failing to create these kinds of skills in responsible adults.

Nationally, there is recognition that "No Child Left Behind" was a seriously flawed educational policy. A new Common Core standard has emerged to replace this. The Common Core is clearer on the outcomes and has made notable improvements in certain educational proficiency assumptions at higher grade levels. As a school we applaud those improvements. Unfortunately, some of the proposed standards and the means for assessing educational progress, particularly for the lower grades, clearly contradict with our Waldorf principles and known research on child development. These could impair the ability for charter schools to innovate.

Waldorf methods have a proven track record for preparing the child to be more resilient as a child navigates a changing world. We want to make sure we continue to evolve our methods to ensure that we are continually protecting and nurturing the child.

### ❑ Local Impacts:

- Keeping our teachers and parents informed on changes in education.
- Adapting to changes in Common Core standards in a way that allows us to meet the standards by 8<sup>th</sup> grade but in a sequence that maps more closely to our beliefs on age appropriate learning.
- Adapting to changes in state assessment methods including the Smarter Balance assessments, especially for our lower grades.
- Addressing the special educational and behavioral needs of an increasingly diverse student population.
- Experimenting with and intelligently incorporating new educational topics, methods and modalities.
- Spread of alternative educational choices through home schooling and other charter programs.
- Continued risks to educational funding due to competitive pressure for public funding.
- The political climate within our district is slightly positive but still mixed toward charter Waldorf schools. That climate could change quickly.



❑ Our Choices:

We choose to offer a Waldorf-inspired educational option to the families that want it. We continue our commitment to educating the head, heart, and hands of our students in a fashion that unfolds naturally with the development of the child. We will integrate the Common Core standards as best we can in alignment with evidence-based neurological development of children. We seek to incorporate the healthy use of technology in age-appropriate ways. We will be leaders in the Waldorf charter movement to support and influence policies, standards, and financing for innovative educational alternatives. We will manage our growth in a healthy and sustainable fashion to increase the opportunities for families to receive a public, Waldorf-inspired education and to ensure our financial viability.