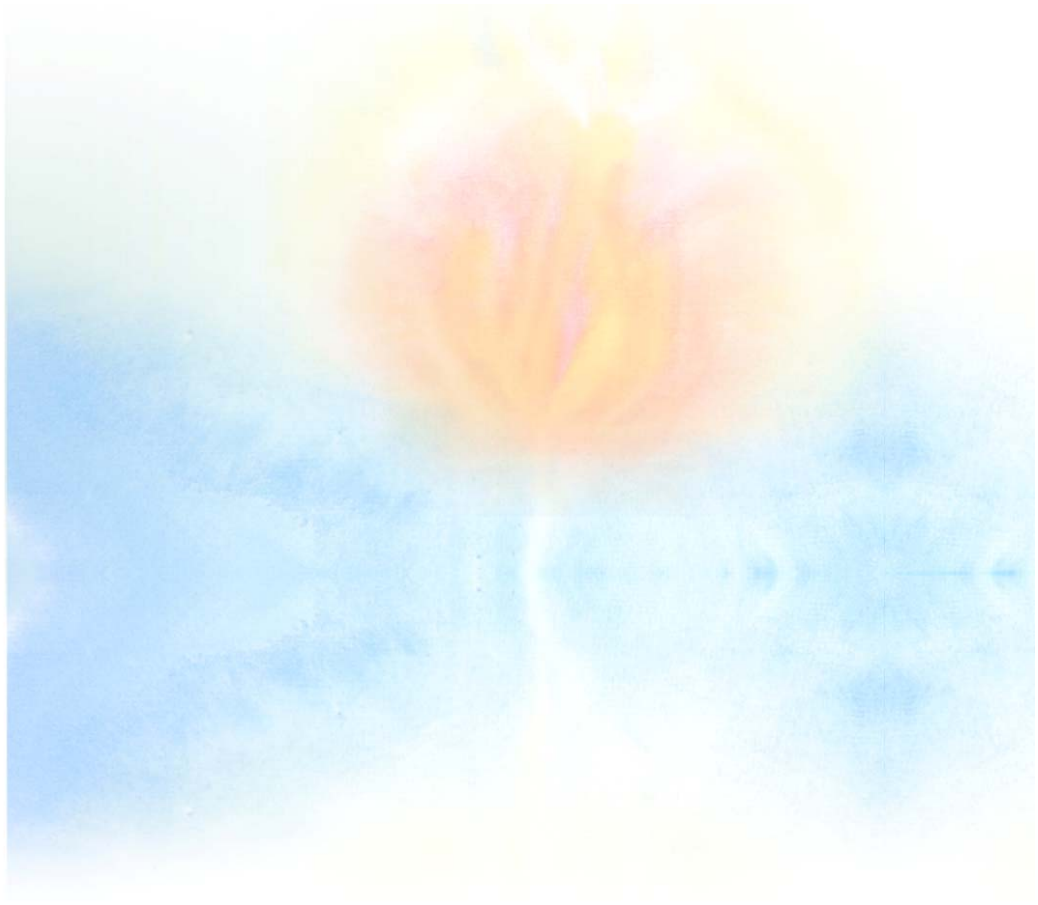


WALDORF SCHOOL
of Princeton



Strategic Plan

September 2009

I. Introduction

One of the primary responsibilities of the Board of Trustees of the Waldorf School of Princeton is to engage in strategic planning. The intention of such an effort is to identify long-term goals and define action plans in order to achieve these goals. In the broadest sense, our goals do not change, as stated in our School Governance Document¹:

“The Board shall do the following [with regard to Strategic Planning]:

- ensure the realization of the pedagogical vision of the College;
- create and implement long-term strategic plans in support of the School’s mission;
- ensure the full enrollment of the School;
- plan, develop and maintain the School’s buildings and grounds;
- promote the mission of the School to the community at large; and
- raise funds for operating, capital and endowment needs.”

This is all done in service of the school’s mission, which is stated as follows:

“Through a rich curriculum integrating the academic, the artistic, and the practical, the Waldorf School of Princeton guides children to foster self-knowledge and to meet the world by awakening within them warmth of heart, clarity of thought, and strength of purpose.”

In light of these goals, the Board undertook a strategic planning effort and produced more specific goals, objectives to pursue in support of those goals, and actions to undertake in order to reach the objectives. These items were organized into five themes as follows:

- Enrollment
- Faculty
- Facilities
- Finance
- Governance

The results of this effort follow. The Board will continue to maintain this strategic plan and update it as actions are performed, objectives are accomplished, and further objectives are developed.

II. Enrollment

Goal: To attract and retain children and families that share Waldorf values, and to achieve a level of enrollment that is consistent with financial and pedagogical health.

Objective: To assess and develop a tuition structure that supports the school and the parents.

Action: Review the tuition structure and revise the tuition assistance program to improve its flexibility and implementation as our enrollment changes. (Finance Committee)

¹ Waldorf School of Princeton: School Governance, August 2008, pg. 3.

Action: Develop an enrollment/retention database and tracking system and systematize the reporting and use of enrollment statistics by the Board in its operational planning. (Administration)

Action: Determine the level of enrollment necessary to support stable programs. (Finance Committee)

Objective: To state clearly who we are.

Action: Describe and communicate the Waldorf curriculum in a manner intended for comprehension by those not already trained in or predisposed to the Waldorf community. (College)

Action: Define the educational support offerings available at the school and our ability (and the limits thereof) to accommodate those children who require additional educational support. (College & Administration)

Objective: To achieve more stability in our enrollment by developing new entrypoints into the school.

Action: Evaluate the possibility of bringing more coherence to our middle school grades, and the potential benefits thereof. (College)

Action: Evaluate the costs and benefits of developing additional satellite pre-schools programs and/or pursuing strategic alliances with other groups that form around parents of very young children. (??)

Objective: To solve the question of what our graduates can do who want to continue with a Waldorf-style curriculum.

Action: Investigate the establishment of relationships with high schools that we may serve as a possible feeder to. (??)

III. Faculty

Goal: To have the best possible faculty that is dedicated to supporting the school's mission, an appropriate environment to continue to attract and retain such faculty, and a means of ensuring stability for the sake of the students and families.

In 2005, the Board took action to significantly improve compensation for all faculty and staff, and subsequently calibrated and extended these improvements. Though not the sole reason, such action contributed a reduction in annual faculty turnover from eight teachers just a few years ago to none last year. Unfortunately, continued enrollment pressures have forced the Board to temporarily halt continued compensation improvements. But we recognize too that compensation is not the sole determinant of either the quality or the dedication of our faculty. Strong determinants of why teachers continue to come and stay include job satisfaction, respect from the community, a sense of belonging, continued investment in support of the teachers' growth, and of course, a love of Waldorf education.

Objective: Develop a financial compensation and benefit package that is both attractive, sustainable, and supportive of a long-term relationship between the individual and the school²

Action: Review and revise the existing compensation package as appropriate to meet the school's and the individual's needs. (Compensation Committee)

Objective: Develop a "deep bench" of faculty

Action: Determine the resources needed to ensure that there is sufficient depth of faculty to allow us to plan for each new year's grade school teacher assignments in a timely fashion, to allow faculty to have a manageable workload, and to be able to handle contingencies. (College and Administration)

Action: Establish a fund for training and hiring of support faculty. (College and Finance Committee)

Objective: Ensure the quality of new and continuing faculty

Action: Establish an appropriate level of investment in teacher development. (College and Finance Committee)

Action: Maintain and assess the ongoing teacher support and evaluation process. (College)

Action: Ensure that funds are available for assistants, and focus more deliberately on cultivating assistants who may eventually turn into full-time faculty, as experience shows that many of our faculty started off as assistants. (College and Finance Committee)

IV. Facilities

Goal: To bring together the community through the successful stewardship of the land and the resources of the school, in the most beautiful way we can imagine, into a space where the community can assemble.

In 2008, the Golden House underwent substantial renovation to make it more attractive and welcoming to the community and prospective families. Additional classroom space was also created, allowing us to achieve the long-held goal of consolidating all of our programs onto one campus. We were able to do so partly because we needed space for only seven grade school classes for the next couple of years. Nonetheless, we must look forward to expanding against to an eight-grade grade school shortly.

² This objective should not be construed as a legal commitment of any sort beyond the employment contract entered into between the school and the individual. This objective is a spiritual one, and any attempt to use this objective to infer an implied legal guarantee of extended employment by the school is not only without merit, but just plain mean.

Objective: To ensure sufficient space for all school programs and for the proper administration of the school.

Action: To conduct an assessment of all current assets and their utilization with the intention of using and reusing existing structures to the extent possible to meet our needs rather than develop new ones. (Facilities Development Task Force).

Action: To develop space to meet our upcoming needs for eight grade school classes, up from the seven grade school classes we can currently accommodate. (Facilities Development Task Force).

Action: To assess our ongoing needs for additional space for the Early Childhood program, including consideration for the possibility of an additional nursery class and the addition of a program for two-year-old children. (Early Childhood Chair/College)

Objective: To develop a space for the community to assemble on our own campus.

Action: Evaluate the value of building a multi-purpose facility, such as an auditorium or gymnasium, in the context of this objective and our overall goal for facilities. (Facilities Development Task Force).

V. Finance

Goal: To provide sufficient resources to ensure the stability and long-term health of the School, its programs, its faculty and staff, its facilities, and its student body.

The school's enrollment has been declining for the last several years which has made it more difficult to maintain a consistent operating budget. This year, however, we have stabilized our enrollment and consequently, stabilized our budget and cash flow situation. The school has also developed preliminary models of cash flow and operating budgets over a three-year period.

Objective: To stabilize the school's finances

Action: Establish a plan to rebuild the school's capital base. (Finance Committee)

Action: Unfreeze the compensation program to the extent that is consistent with a healthy budget. (Compensation Committee and Finance Committee)

Action: Continue to monitor the school's balance sheet, cash flow, and budget projections to ensure that the school's finances are consistent with expectations. (Finance Committee)

Objective: To develop long-term financial plans consistent with our other goals for the school and our expectations of our capital and income situation over the coming years.

Action: Identify, prioritize and assess objectives in the strategic plan that would potentially require additional funds beyond the normal parameters of the operating budget. (Board of Trustees and Administration)

Objective: Strengthen the business office

Action: Empower and fund the administration to hire appropriate personnel into the business office to ensure that the Board treasurer is not forced to be the school's business manager. (Board of Trustees)

Action: Improve oversight of accounting practices. (Finance Committee)

VI. Governance

Goal: To strengthen and institutionalize the governance structures that we have developed.

Over the past few years, the Board and the College have worked diligently to develop and formalize a governance structure that is consistent with the cooperative structure that is conventional at a Waldorf institution. This structure is described in what is known simply as the School Governance Document, and the Board, the College, and the Administration have done their best to realize the governance structure described with considerable success. Long-term success, however, will only be achieved after the leadership involved with the structure's development has moved in and been replaced by others who are able to successfully carry on the structure.

Objective: To ensure smooth leadership transitions.

Action: Move the election of officers from the beginning of the Board term to near the end of the previous Board term, allowing for more overlap in the handoff between successive Board leaders. (Governance Committee)

Objective: To ensure the quality of the Board's execution.

Action: Institute assessments of the Board from other leadership bodies: the Administration, the College, and the Parent Council. (Governance Committee)

Objective: To make sure that the community at large understands how the school is governed.

Action: Publish the School Governance Document to the community (on the web). (Governance Committee)

Action: Engage in periodic dialogues with the community regarding the governance structure. (Board Chair)