

Game Plan Process Update

June 2014

Introduction

On September 27 – 28, 2013, RWS held the culminating event of a strategic planning process that had begun months before in the spring of the same year. Faculty, members of the Board of Trustees and parents came together in an effort to describe the current state of the school, create a picture of where the school could be in the next couple of years and identify what stands between the current state and where we see ourselves in the near future.

Detailed reports were presented regarding our programs, the staffing of the school, school finances, school governance, trends in retention and attrition, and parent feedback regarding many aspects of families' experiences at RWS. Through a series of small and large group exercises we analyzed the data for themes, opportunities and challenges confronting the school.

All this hard work and collaboration resulted in the identification of several key initiatives aimed at executing the RWS mission more effectively. We committed to initiatives in the areas of finance, program, customer satisfaction, new family orientation and school governance.

The key initiatives chosen included the following:

- **Tuition and Related Income:** We will revise our current tuition structure to generate more revenue
- **Assessment of Program and Students:**
 - We will decide on the meaning of benchmarks and then establish that as a guideline for current grade-structured curriculum
 - We will develop and share a common vocabulary throughout the entire school
 - We will communicate students' progress using common curriculum guidelines and language
- **Attrition/Retention:** We will hire a professional to analyze school attrition so that we can understand and pinpoint issues to improve retention
- **Retain Students: Orientation** – We will develop (revise) the process for welcoming and orienting new families to RWS
- **Assess Governance Structure:**
 - Structure - We will interrogate the governance structure to identify strengths and opportunities and choose a structure that will achieve our values-based mission
 - Roles and Responsibilities - We, a committee consisting of members of the Faculty College, Board of Trustees, Parents and Administration, will define in detail the authority, responsibility and accountability of every position, committee and governing body at RWS

Work on these initiatives has been ongoing throughout the school year. A “state of the school” Town Hall meeting was held on January 16, 2014 where leaders from each initiative presented a summary and update of their work.

Below is an end of the year update of each initiative describing what the goal was, what was done to meet the goal and any outstanding work or future plans. The lead for each initiative is listed in parenthesis.

Key Initiatives

Tuition and Related Income (Brian Bechtold)

The goal of the Finance Initiative was to revise the current tuition structure to generate more revenue in order to provide better wages and benefits to our staff and to increase our reserves. The Finance Initiative team (Martha Harville, Amelia Halgren, Meredith Bechtold, and Brian Bechtold) and the Board Finance Committee reviewed our tuition pricing in relation to private schools in the Richmond area and to Waldorf schools across the country.

Through our analysis, we observed that our current tuition support structure was keeping us from realizing our goals. In an effort to minimize the impact on our current enrolled families, we made minor changes to their pricing structure and proposed bigger changes for new incoming families. This strategy will allow us make immediate changes of which we will reap the benefit for years to come.

For next year, we estimate that the tuition price changes that were approved by the Board of Trustees in December 2013 will increase our revenue by 6.7%. With this increased income, we can begin to allocate funds toward our budget goals in the coming year. This initiative is an ongoing task of the Finance Committee and will be reviewed every year to determine if further pricing changes are necessary.

Assessment of Program and Students (Bethany Craig)

The Assessment Initiative team (Bethany Craig, Dawn Pollard, and Cathryn Bump) along with the entire Grades Faculty took up the task of establishing a curriculum outline to promote parent understanding for currently enrolled and prospective families. The Assessment Initiative group worked throughout the year to accomplish this goal and have developed the following two documents:

1. A concise and thorough outline of the language arts, arithmetic, science and social studies curricula for use during the enrollment process and to distribute to all enrolled families and interested parties.
2. A far more detailed outline of the curricula in these areas to be provided to all teachers as a guide when establishing the specifics of each year's curriculum.

We are now in the process of discussing methods of assessment.

Attrition/Retention (Katie Adams Parrish)

At the close of the Game Plan retreat in September, the Retention Initiative Group (Katie Adams Parrish, Cary White, Kathy O'Bryan) was tasked with facilitating the hiring of outside professional or independent firm to conduct an annual community satisfaction survey and to develop an instrument and process for

gathering feedback from departing families in order to better understand and address concerns as a means of improving retention.

- At the November 2013 BOT meeting, approximately \$5,000.00 was identified that could be allocated for this purpose.
- The Retention Initiative Group solicited and received three separate proposals from a nonprofit consultant, a small consulting firm and the VCU Survey Evaluation and Research Lab outlining the services that each entity could provide and at what costs.

In advance of the April 2014 Board meeting, the Retention Initiative Group sent the Board of Trustees (BOT) a summary report and recommendation to contract with Trina Willard of The Knowledge Advisory Group, a small consulting firm that specializes in services for non-profit organizations, government entities and educational institutions. At the April 2014 Board meeting, the BOT voted to table the decision to engage this firm until our September 2014 meeting.

Retain Students: Orientation (Tracy Werner)

The goal of this initiative was to develop (revise) the process for welcoming and orienting new families to RWS by:

1. Redesigning the information packet
2. Establishing an orientation process
3. Establish a mentor family program
4. Expanding the circle of staff to provide contact and information
5. Providing social opportunities for parent clusters (Kindergarten/Elementary/Middle School) to develop stronger relationships with one another and the school

The New Family Care committee (Tracy Werner, Amelia Halgren, LaToya Good, Katie Adams Parrish, Kim Washburn, Megan Chase, and Katherine Gallagher) developed the following list of initiatives to be implemented for the 2014-15 school year:

- New Family Information Packet to be given to all new families as they join the school. It would include:
 - Parent Handbook
 - RWS Full Directory
 - School Year-at-a-Glance Calendar
 - Bumper Sticker
 - Grade Specific Material
 - Summary document of the following:
 - Intro to Steiner/Anthroposophy
 - Festival descriptions (and dates when possible)
 - Most used contact information
 - Channels of Communication (mailbox, Constant Contact distribution list, Parents Corner, RWS Facebook private group)
 - The importance of the three R's (Rhythm, Reverence and Ritual) in Waldorf Education

- Establish a Parent Partner Program in order help integrate new families into the RWS community. Parent Partner Families would serve in two main capacities: as welcoming partners, and as communicators with a family that is new to the school. The Parent Partner Family reaches out to the new family and provides them with support, social opportunities, resources, answers when possible, and familiar faces to help foster a living connection to the school. Additionally, the Parent Partner Family assists new families in understanding the significance and content of various events, presentations and festivals throughout the year.
- Facilitate parent social opportunities

Future initiatives could include:

- Possible formal new parent meetings in the fall and spring for feedback, questions, comments
- Possibly include a family picture in the Messenger for each new family so that existing families will be able recognize and welcome them.
- Have a faculty/admin person meet new families on their first day of school (if it's not at the start of the year) to help them navigate their way around.

Governance Structure (Roberto Trostli)

The goal was to assess the governance structure to identify strengths and opportunities and choose a structure that will achieve our value based mission.

Report from the Governance Initiative Group, May, 2014

Roberto Trostli, chair; Deborah Baharloo; LaToya Good; Craig Schwartz; Lynn White

The Governance Initiative Group was formed at the Game Plan meeting in September. The group was given the following mandates:

1. To interrogate RWS's governance structure to identify strengths and opportunities and choose a structure that will achieve our values-based mission.
2. To define in detail the authority, responsibility and accountability of every position, committee and governing body at RWS

Process: During the fall, the group facilitated a conversation among the Board of Trustees and four conversations with the Faculty College. We also distributed a questionnaire to all employees of the school and to those parents who had participated in the Game Plan. As a result of the data we collected, we compiled a situational analysis of our current state and formulated what we thought would be a desired future state. This future state would include the following:

1. Structure:

- an organizational structure that serves the school well and that can be described clearly
- appropriate terminology for positions and groups

2. Roles & Responsibilities:

- clarity and agreement about the roles and authority of all groups and positions in the school
- greater coordination and collaboration among groups/committees

3. Authority, Oversight & Accountability

- a leadership group
- greater delegation of authority and acceptance of authority
- better oversight and higher levels of accountability for performance and fulfillment of goals

4. Performance

- more effective leadership and evaluation of leadership performance
- better execution of tasks and evaluation of performance

5. Decision-making Processes & Issue Resolution

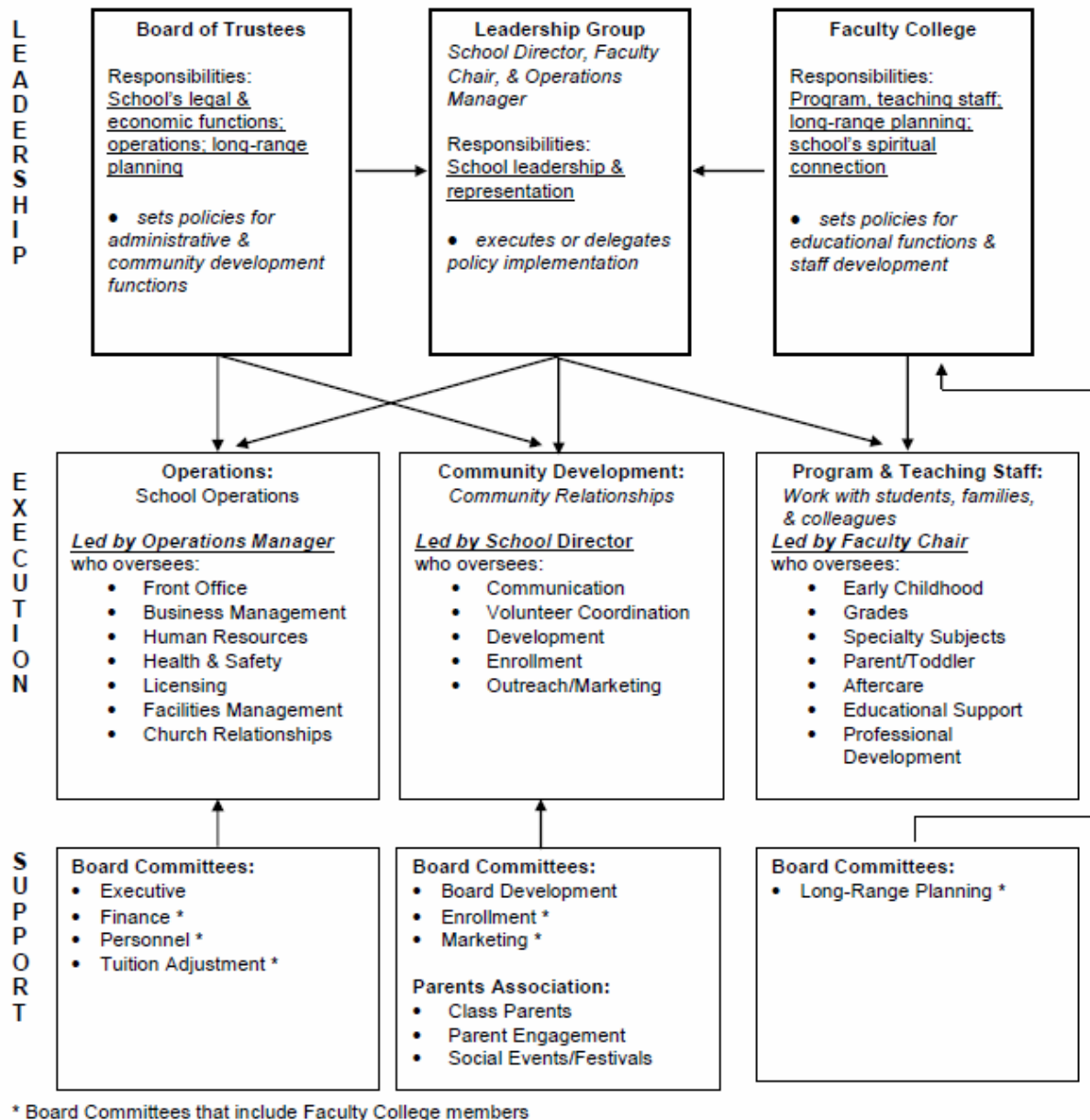
- more efficient decision-making processes
- clearer, more effective pathways for issue resolution

6. Communication

- communication that is clearer, more timely, more consistent, and more courteous

Board and College Involvement: In February 2014, the Governance Initiative Group presented a proposal for a new governance structure to the Board of Trustees and the Faculty College. This proposal is summarized by the diagram below. The proposal did not address all of the points raised by the situational analysis; rather, as an initial undertaking, it focused on structure and leadership. The Group planned to direct its attention to other issues after the implementation of a revised governance structure. The Board and College approved the proposal in principle and put a process in place to consider whether and when the proposal could be implemented.

REVISED GOVERNANCE STRUCTURE



Salient Points:

Scope of Responsibility: We recognized the need for clearer distinctions between setting policy and policy execution. The former should be done by the Board and the Faculty College, the latter by the organizational leaders and those who work with them.

Primary Structural Changes: RWS had previously divided the school's functions into two major categories: pedagogy and administration. The Governance Initiative Group concluded that the school would benefit from dividing its functions into three categories:

Program and Staffing
Community Development
Operations

Program and Staffing remains at the heart of the school. The Faculty College sets policies in this area, and these policies are executed by the teaching staff. This area would be led and overseen by the *Faculty Chair*.

Operations comprises some of those areas that have been called School Administration. These include management of the office, business functions, personnel, health & safety, records, and facilities, etc. This area would be led and overseen by the *Operations Manager*.

We proposed that *Community Development* be added as the third functional category within the school. This area would include communication, volunteer coordination, development, enrollment, PR/ outreach, and marketing. This realm would be led and overseen by the *School Director*, who would serve as the voice of the school and represent the school to the wider community.

Deliberation Process: Discussions in the Board and the Faculty College focused on the role of the leadership group, equality of roles, and job descriptions for the three leaders. Ultimately, the Board and the Faculty College determined that the three leaders would have equivalent levels of authority and oversight, and that they would collaborate as equals in the Leadership Group. Job descriptions were formulated, revised, and affirmed by the Board and the Faculty College.

Implementation: Individuals who were interested in assuming one of the three the leadership positions have been asked to meet with members of the Board and the Faculty College to discuss their interest. We will use our existing procedures for consideration when current staff apply for a different position in the school.

Future Steps: The Governance Initiative Group was asked by the Board and College to work on the delineation of the responsibilities, authority, and oversight of the positions and committees within the school. During the coming months it will submit its proposals for consideration. We expect that this work will continue into the next school year as we continue to try to realize this vision for our school.

Conclusion

Participating in the Game Plan process was and continues to be a catalyzing experience for Richmond Waldorf School. The process afforded members of the school's leadership the opportunity to focus on and address the most pressing challenges that the school faces at this stage of its growth and development.

While we take pride in the considerable work that has been accomplished towards the key initiatives outlined in this report, we recognize that there is still more to do. Each committee will carry forth the work with which it was tasked until that work is complete.

The Long Range Planning Committee of the Board of Trustees will continue to provide periodic updates to the larger RWS community on progress that is made. As the work of these primary initiatives reaches completion, we will begin to address additional challenges and/or opportunities identified through the Game Plan and other strategic planning efforts.

If you have any questions about this report or would like to get involved in the work of the Game Plan, the Board of Trustees or the Parents Association, please be in touch with Katie Adams Parrish, Vice President of RWS Board of Trustees. We value the insights, input and involvement of each member of the RWS community and welcome your comments, feedback and engagement.