

**Three Cedars Waldorf School  
Executive Director – Action plan 2013-14**

The 2013-14 action plan outlined below follows the 2011-13 initial and 2012-13 updated ED Action Plan, essentially completed in March of 2012. ED Action Plans are derived from the Strategic Plan as defined by the TCWS Board of Trustees. For the 2013-14 school year, on the foundation of the significant improvements in the school's financial position, successful recruiting of qualified faculty, and completed implementation of updated administrative practices, the ED's plan focuses on the development of the following essential areas:

**A. Finances**

**B. Programs**

**C. Advancement**

**D. Facilities and Site Development**

The ED intends this action plan as an evolving working document, updated regularly to reflect stages of evolution and completion of each focus and task. Progress and updates are communicated on an ongoing basis via monthly Incidental Reports to TCWS Board, and as-needed regular communication to the public via the school's bi-weekly newsletter.



Geraldine Kline, Executive Director  
Three Cedars Waldorf School

## **A - Finances**

### **Background and Rationale**

The Three Cedars Waldorf School believes its mission to be relevant for a long-time to come. Therefore, the school strives to deliver its mission within thoughtful strategic choices that ensure sufficient financial resources. To achieve its long-term sustainability the school anchors its financial position in a long-term financial plan that includes prudent management of its resources, reasonable, predictable, and manageable income streams, and adequate reserves.

To sustain adequate operating income, the school builds and maintains adequate enrollment and tuition levels that reflect the true value and costs of its programs. To attract qualified staff the school offers competitive compensation packages.

### **FOCUS**

**Secure the long-term sustainable financial operation of the school.**

#### **Task I**

Maintain a revolving long-term financial plan derived from the intentions and commitments outlined in the ED work-plan

1. Maintain a multi-year financial plan including current year's budget plus four years.
2. Revolve annually and revise to accommodate plan updates, enrollment, updated income and expenses.

#### **Task II**

Strengthen the school's financial position by maximizing its current assets base and revenue sources.

1. Maintain sufficient tuition income revenue to provide at least 95% of operating revenue.

#### **Task III**

Build fundraising revenue based on:

- a. Donation history.
- b. Funds raised in a given year are kept in reserve for specific projects the following year – start in 2014-15.
- c. Annual Fund giving – no more than 5% of operating budget – see C. focus 2.
- d. Capital Campaign – dedicated for the purpose of site development. See C. focus 3

## **B. Programs**

### **Background and Rationale**

The Three Cedars Waldorf School operates programs for students in preschool through grade 8. Three Cedars Waldorf School is founded on the pedagogical work of Rudolf Steiner and the ongoing research of the Waldorf Movement in which it is an active participant. Working from the ideals of Waldorf Education, TCWS highly values beauty, integrity, the uniqueness of each individual and their contribution to the responsible development of society.

We recognize the necessity of educating and developing our community of students to its fullest potential - spiritually, ethically, intellectually, socially, and physically - in a caring, nurturing, and appropriately challenging environment. While we honor parents as the primary educators, we value and contribute to a close and meaningful partnership between home and school.

In the tradition of global awareness characteristic of Waldorf education, we prepare each student for a world-wide perspective, guiding them to recognize and accept responsible and creative participation in their family, school community, society, and in the world.

### **FOCUS – Further develop the school’s curriculum and programs to prepare students to embody the school’s mission.**

#### **Task I**

Determine the needs and outline the considerations necessary to offer the highest quality Waldorf education from preschool through grade 8 in Bellevue.

- a) **Review all programs** vertically (by grades) and horizontally (by subjects) according to protocol below.
  - a. What was originally intended with the Waldorf curriculum?
  - b. What are the best practices in Waldorf school worldwide?
  - c. What is our school currently doing?
  - d. What do we want to offer from this point on?

#### **Task II**

Continue enhancing our curriculum and programs to address the needs of our students in our rapidly changing world.

1. Subjects programs – purpose, goals, achievements.
2. Strengthen curricular relations and formulate our preschool grade 8 curriculum across subjects and across divisions.
  - a. Define learning outcomes by grades preschool through grade 8.
  - b. Define learning outcomes by subjects.
  - c. Articulate Grade Eight preparedness for high school benchmarks.

## C – Advancement

### Background and Rationale

Three Cedars Waldorf School is committed to fulfilling its mission by serving students in Preschool through Grade Eight educational needs in the Bellevue region and beyond to its full capacity, and by engaging the school community in a culture of generous support.

### FOCUS I – Reach full enrollment

#### Task I

- a) Maintain **Enrollment Strategy with over 95% enrollment in September 2014**

ENROLLMENT GOALS	2013-2014	PROJECTED 2014-2015	PROJECTED 2015-2016	PROJECTED 2016-2017	PROJECTED 2017-2018
grade 8	11	10	15	11	12
grade 7	10	15	11	12	17
grade 6	15	11	12	17	17
grade 5	11	12	17	17	15
grade 4	12	17	17	15	15
grade 3	17	17	15	15	15
grade 2	17	15	15	15	15
grade 1	15	15	15	15	15
<b>Elementary Enrollment net Withdrawals</b>	<b>108</b>	<b>112</b>	<b>117</b>	<b>117</b>	<b>121</b>
<b>Kindergarten Enrollment net Withdrawals</b>	<b>38</b>	<b>48</b>	<b>60</b>	<b>70</b>	<b>70</b>
<b>Total enrollment</b>	<b>146</b>	<b>160</b>	<b>177</b>	<b>187</b>	<b>191</b>
<b>Total enrollment capacity *</b>	<b>158</b>	<b>168</b>	<b>180</b>	<b>190</b>	<b>190</b>
<b>Total capacity 188 students – in %</b>	<b>92.40%</b>	<b>95.23%</b>	<b>98.33%</b>	<b>98.42%</b>	<b>100.52%</b>

\* Grade School – 120 students (15 per class average) – Early Childhood: 3<sup>rd</sup> kindergarten class opens in 2015-16 with partial enrollment in year 1.

#### Task II

- a) Engage Enrollment Team including parents and staff members to implement the enrollment strategy and design:
- Open Houses – November and January
  - Outreach – preschools, kindergarten, grades 1-5 schools within 30 miles of TCWS
  - Advertising Campaign – Implement Marketing Team strategy: promotional video, paper and web-based advertising.

## **FOCUS 2 – Develop a culture of generous support**

### **Task I**

- a. Create a Fundraising team to design and hold fundraising activities, to reach at least 5% of operating budget
  - Scrip Program – monthly sales booth in plaza - \$5,000 net
  - Fundraising Event – Spring Community Concert & Auction - \$22,500 net
  - Annual Fund – Year-long - \$134,000 net

## **FOCUS 3 – Develop Capital Campaign 2014-15**

### **Task I**

Create a Capital Campaign plan earmarked for site development in 2014-15

- Prepare Capital Campaign structure and sequence
- Launch Capital Campaign in October 2014

## **D – Site Development**

### **Background and Rationale**

Three Cedars Waldorf School is committed to improving its site to ensure the proper delivery of its curriculum and programs and honor the long-range site development plan approved by the City of Bellevue.

### **FOCUS**

**Manage site improvements within the Master Plan approved by the City of Bellevue.**

### **Task I**

Conduct study for major floor renovation of Trillium Hall in 2013-14 and raising of building C for 2013-14

Conduct study for creation of a 3<sup>rd</sup> kindergarten for 2015-16

Create a Site Development Team to plan for the campus long-term development