

2023-2028

STRATEGIC PLAN

*Incorporating 40 years of learning
into a unified vision for tomorrow*



PORTLAND WALDORF
SCHOOL

CORE VALUES

1. Develop the whole self to be balanced and healthy
2. Honor place and care for our home.
3. Nurture relationships and uplift humanity.
4. Connect with spirit through reverence and seeking our true purpose.



VISION

Portland Waldorf School seeks to inspire in our students a joyous, life-long love for learning and a reverence for life. Operating from a sound financial model we aspire to be economically accessible, socially responsible, and inspirational in the Waldorf and broader communities. We will build on our successful past by renewing and extending our commitment to our core values, enhancing our programs and facilities, and deepening our understanding of human development.

MISSION

Portland Waldorf School educates children for the whole of life in order to uplift humanity. Out of the insights of anthroposophy, the school nurtures the imagination, cultivates the intellect, and recognizes the unique spirit of each child in the community. In this way, children are surrounded by striving adults and strengthened individually and socially to meet the challenges of life. Students emerge as creative, independent thinkers who meet the world with initiative and purpose.

LAND ACKNOWLEDGEMENT

Portland Waldorf School recognizes that we are here because of sacrifices forced upon the original people of this land. We honor with gratitude the Multnomah, Kathlamet, Clackamas, Cowlitz, Silez, Tumwater, Watlala bands of the Chinook, the Tualatin, Kalapuya and many other Tribal nations and people of the Willamette and Columbia River regions, who belong to and have cared for this land since time immemorial. We honor and pay our respects to the Native American people of this land, past, present and future.

PWS STRATEGIC PLAN AT A GLANCE

- 01** BUILD AND SUSTAIN ENROLLMENT BY SECTIONS
- 02** REINFORCE CURRICULUM AND PROGRAMS
- 03** STRENGTHEN COMMUNITY HEALTH
- 04** STRENGTHEN DIVERSITY, EQUITY, INCLUSION AND JUSTICE AT PWS
- 05** PROVIDE FOR FINANCIAL STABILITY
- 06** ENHANCE CAMPUS AND FACILITIES

INTRODUCTION

Portland Waldorf School proudly presents this Strategic Plan as a roadmap for the next five years. It will help to drive priorities and focus efforts across our Early Childhood, Grades and High School programs, and unite our community around a common vision for the future. Creating the Strategic Plan is a collaboration between the many groups that comprise PWS. The process of strategic planning invites a look inward, a focus on our Mission, and a reflection on our identity and especially on our commitment to educating children for the whole of life. This Strategic Plan seeks to advance our vision as a unified school community, sharing the lifelong gifts of Waldorf education with students of all ages.



BUILD AND SUSTAIN ENROLLMENT BY SECTIONS

PWS seeks to strengthen enrollment from early childhood through high school. We also want to foster an environment of continuity, with class sizes sustained through the grades and students moving organically to high school. PWS will pursue the following goals and related strategies in pursuit of its mission:

1

Implement an Ongoing Plan Beginning in Year One to Grow a More Full, Sustainably Enrolled PWS High School

- Research and evaluate PWHS student, staffing and facility needs to maximize PWHS enrollment
- Create plan to track metrics/data including enrollment and attrition
- Design communication and marketing plans to fully illustrate the PWHS identity and what it offers

2

Develop and Implement a More Full, Sustainable Enrollment Plan for Grades 1-8 and Early Childhood

- In addition to the above goals, design a plan to integrate Grades programs and faculty with HS programs and faculty
- Provide activities for students of all ages at admissions and community events
- Design printed and digital materials to articulate and communicate the unique value of PWS programs and curriculum offerings

3

Annually Re-evaluate and Adapt Enrollment Plans to Ensure Relevance and Efficacy in a Changing Environment

- Ensure timely reporting and tracking on PWS' financial and enrollment goals, to empower effective decision making
 - Evaluation and update summaries are submitted in writing to the Strategic Planning Steering Committee (SPSC) annually by June 30; the SPSC will update the Board of Trustees on progress



REINFORCE CURRICULUM AND PROGRAMS

The quality of our curriculum and educational offerings is at the very heart of PWS. Foundational to our success is a process of review, innovation, and reinforcement with Waldorf pedagogy true to the developmental stages of human beings. This allows us to maximize our potential by providing an education integrated from preschool through high school.

1

Increase High School Readiness and Continuity in the Lower School

- Align curriculums and prepare Lower School students for transition to high school
- Integrate Lower School and High School programs and faculty
- Create and implement ways to improve Lower School students and parents connection/exposure to the high school

2

Fortify the High School's College and Career Guidance Program

- Strengthen offerings to PWHS students to support their next steps after graduation
- Communicate college and career offerings to current and prospective community

3

Strengthen PWS' Student Learning Support Services

- Update school-wide Student Learning Support Plan process by summer of 2023
- Define and communicate to our community the Student Learning Support Services that are coordinated or facilitated by the school for students who may face academic, social, or emotional challenges

4

Enhance Music Program

- Review and refine music program for Grades 3 thru 12
- Evaluate and plan for staffing needs to support vision annually

5

Increase Early Childhood Offerings

- Establish Parent and Child offering twice per week (including the possibility of Saturday programs)
- Establish a three-day per week half-day preschool program
- Create and implement outreach plans

STRENGTHEN COMMUNITY HEALTH

The health of the PWS community is of paramount importance to the support and success of our education and programming. There are innumerable factors that support this health and we have identified a few primary goals for the next five-year cycle.

1 Improve Teacher Retention

- Establish a minimum-salary schedule of at least \$50,000/year for full time teachers
- Create a new salary schedule to retain current staff and attract competitive candidates within a sustainable budgetary framework
- Review and update position descriptions and teaching assignments
- Establish onboarding processes by summer of 2023
- Update mentoring program to ensure a clear understanding of teaching tasks in PWHS by August 2023
- Review retention outcomes and refine goals annually

2 Increase Volunteerism and Community Engagement

- Identify a person/committee to recruit and coordinate volunteers across the PWS community
- Communicate volunteer opportunities and needs at beginning of each year
- Increase community participation in all-school events, meetings, and community education opportunities



3 Prioritize Communication and Transparency

- Review, refine, and clarify current PWS leadership model and publish an organizational chart to the community
- Document and share financial, tuition, and budget planning calendar
- Create and publish an annual report by November 1 of each year
- Annually communicate curriculum offerings, including any additions or changes
- Ensure proactive, responsive communication, and solicit community feedback

STRENGTHEN DIVERSITY, EQUITY, INCLUSION AND JUSTICE AT PWS

PWS seeks to create an inclusive community, where all people feel welcome and supported. In that effort, it strives to attract, retain, and support students, faculty, and staff from diverse cultures, traditions, and backgrounds. These values are already interwoven throughout the community and we look to enhance and strengthen these areas:

1

Grow DEIJ Awareness in the PWS Community

- Share PWS' DEIJ related work through regular school-wide communications
- Provide ongoing community education around festivals and during heritage months
- Increase the presence of our Land Acknowledgment
 - Actively engage in community-wide land stewardship
 - Share our Land Acknowledgment at community meetings
 - Install educational signs on campus
 - Host learning opportunities with local Indigenous collaborators

2

Support DEIJ Education in PWS Culture

- Research and incorporate equity lens in decision-making processes related to policy at a board and leadership level
- Continue to identify materials to support DEIJ education in curriculum, literature and related classroom art
- Continue to fund regular staff trainings on DEIJ topics
- Implement time throughout the year in all groups/section meetings to share new DEIJ insights in classrooms and work
- Encourage awareness about unconscious bias by providing educational opportunities

3

Encourage and Support a Diverse and Inclusive PWS Faculty and Staff

- Employ equity lens in professional development and employee retention plans
- Review and renew all aspects of the recruiting process, including job postings, interview questions, hiring practices and onboarding process

PROVIDE FOR FINANCIAL STABILITY

Financially responsible budgeting is essential to secure the present as well as to sustain the school for future generations. In order to accomplish the related goals for infrastructure improvement, staffing and programming retentions and growth, sustainability, and general financial security, we look to pursue the following goals:

1 Strengthen School Finances

- Annually review and update multi-year budget plan
- Create and implement a plan to reduce school debt and build a reserve
 - Complete financial risk assessment
 - Develop a strategy to build a reserve that captures risk assessment and that covers two months of operating expenses
 - Develop a strategy to build a second reserve for critical capital projects



2 Create and Sustain a Culture of Philanthropy in Support of the Value of Waldorf Education

- Establish a Development Committee to research and create developmental strategy including fundraising purposes, targets, staffing, and marketing
- Create a Director of Development position with appropriate support staff to implement Development Committee plans and cultivate creative and new funding sources



3

Strengthen Foundation for Funding Staff and Faculty Benefits

- Research supplemental retirement benefits
- Establish a path to fund retirement benefits

ENHANCE CAMPUS AND FACILITIES

PWS, as present stewards of the land we reside on, is blessed with a beautiful and expansive campus. Committing resources to maintenance, improvement, and preservation of our various spaces and buildings is essential to supporting not only the growth of our school. We target the below projects for completion in the next five years.

1 Improve Campus Safety and Security

- Create a funding plan to complete Seismic Retrofitting shear wall phase
- Update surveillance system
- Expand phone/intercom system to include all classrooms
- Research feasibility for keyless door entry for primary entrances (front, back and south entrances)
- Complete campus perimeter fencing plan by 2025
- Research and plan for the highest priority major capital improvement projects

2 Facility Upgrades

- Assess needs of Early Childhood play spaces for upgrades
- Upgrade and modernize bathrooms
- Assess maintenance, upgrade needs, and new space development in high school, and create a 3-year plan for completion
- Continue to update high school classrooms with modern furnishings, equipment, and technology

3 Create a Site Vision for the Future of the PWS Campus

- Work with the community to develop a long range plan for the PWS campus



*We thank you for your continued
support of Portland Waldorf School*



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