

Gradalis Waldorf Consulting & Services, LLC

STANDARD I-C— PLANNING POLICY

GENERAL PURPOSE

The purpose of these policies is to establish guidelines for developing planning goals and objectives, making planning decisions, reporting the planning status and progress on planning goals of GRADALIS Waldorf Consulting & Services, LLC (“GRADALIS”).

PLANNING I-C – PLANNING POLICY

The Board of Stewards establishes the GRADALIS Strategic Plan by means of an annualized situational assessment utilizing a SWOT process (Strengths, Weaknesses, Opportunities, Threats). The GRADALIS Strategic Plan is for three (3) years with focused one-year Objectives and Tasks. Implementation of the Strategic Plan’s Goals, Objectives and Tasks is followed upon throughout the Fiscal Year, reviewed on an as-needed basis at monthly Board of Stewards meetings. The Strategic Plan is updated at the Annual Meeting.

RATIONALE

Planning Policy addresses identifiable follow-through to every Goal statement. Goals are taken into account with an ongoing intention and approach for attaining them. Planning is deemed an ongoing pursuit throughout the Institute’s routine activities with updated revisions to development strategies.

Goals possess a level of commitment and priority initiatives that justify their implementation along with particular tactics that apply to decisions involving them. Planning has a central role to play in keeping GRADALIS updated, in vogue, with the Waldorf Movement occurring U.S.-wide. The continuing word concerns the shortage of Waldorf-trained teachers in both private/independent and public/charter schools.

The Planning Policy vis-à-vis the Strategic Plan come about to be accomplished as the context from which programs and services flow with benchmarks of accomplishment to track GRADALIS progress. Successful Planning Policy and Strategic Plan implementation have much to do with commitment, credibility, communication and trust.

Key Reasons for a Planning Policy include:

1. **Direction and Priorities** – need a strategy to set direction; to establish priorities. Defining GRADALIS’s view of success, prioritizes activities to make this view a reality. Planning strategy will help GRADALIS Stewards know what they should be working on, and what they should be working on first.
2. **On Same Page** – defining strategic direction, all others move together to achieve GRADALIS goals.
3. **Simplify Decision-Making** – already prioritized activities necessary for success. Priorities make it easier to say no to distracting initiatives.

4. **Drive Alignment** – avoid essentially majoring in the minors—activities not aligned with priorities. Planning Policy strategies serve as vehicle for answering the question, “How can we better align all our resources to maximize strategic success?”
5. **Communicate the Message** – document key activities and communicate thoroughly; facilitating ‘buy-in’ and commitment.

GOALS

1. Avoid spending time on unexpected changes vs. anticipating and preparing for them; avoid reactive posture.
2. Engage Planning Process looking into the Future; paint a picture of that Future based upon current trends; and, influence forces that will affect GRADALIS.
3. Chart definitive course based on strong indicators of what the Waldorf Educational Movement’s environment will be like in 3-5 years.
4. Track indicators of Waldorf Schools, teachers, colleges and training programs to identify important factors influencing the U.S. Waldorf field of education.
5. Examine the possibilities and formulate strategies to meet the challenges and take full advantage of opportunities and minimize threats.
6. Use GRADALIS energies and resources more effectively, conduct business more successfully, respect students and schools always with a sense of fairplay.

PROCEDURES

1. Conduct an annual SWOT by the Board of Stewards at the Annual Meeting.
2. Establish/maintain Strategic Plan via Stewards’ networks with eyes and ears amongst Waldorf teachers and educators for factors that impact GRADALIS with issues and trends including staff, services, skills, resources and needs.
3. Conduct a Needs Survey to provide information from students, client-schools and faculty with prioritized needs and expectations crucial as basis for setting objectives.
4. Review Mission & Vision to ensure the GRADALIS fundamental reason for existence that establishes the scope of the organization.
5. Review Policies to ensure continuing relevance for GRADALIS, its program, mission & operations.
6. Review and regularly update Goals & Objectives that describe what GRADALIS seeks to achieve in light of needs and relevant Waldorf issues.
7. Implement strategies that reflect specific, measurable actions and directions designed to reach the Goals & Objectives established. These strategies are fulfilled through creation, continuation, enhancement, change or elimination of certain approaches and procedures.