



**Waldorf Consulting  
&  
Services, LLC  
2015**

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## *2015 Annual Report for Gradalis LLC*

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## **INTRODUCTION**

Each year more and more Waldorf-inspired charter schools along with independent Waldorf schools are in need of trained Waldorf teachers. With a collective experience of well over 200 years in Waldorf education, Gradalis Stewards and faculty have lived, taught, breathed and followed the teachings of Rudolf Steiner. Bringing its unique approach to training teacher working in Waldorf Independent and Public Schools, this training has been designed to meet the needs of In-Service, active teachers. This approach is meeting a need whose time has certainly come. So, with this Annual Report, though required to submit an annual report to the powers that be, it is equally accurate, even moreso, an opportunity to reveal the “calling” Gradalis “feels” as it has gone about its work in 2015.

The Gradalis Annual Report is meant to be a public declaration of triumph as much as an accounting of its progress meeting measurable annual goals. The information in the Annual Report is anticipated to also be used by those accrediting bodies in the decision making process when determining their accreditation rubrics. The greatest measure is how well each individual practicing Waldorf teacher is being served through the Gradalis training program.

- **The Gradalis Accountability System**

One of the most significant priorities taking place amongst Gradalis Stewards on a continuing basis is development of an accountability system that includes all students and schools involved with Gradalis – both independent and public. Gradalis feels it incumbent upon its very foundation to be responsive to all schools and Waldorf-teachers-in-training and is accountable to its students, parents and communities – i.e., there’s an implicit covenant with this opportunity to work and to serve.

The Annual Report is an opportunity for Gradalis to report on our progress in identifying strengths and weaknesses in our educational programs through the eyes of our clients vis-à-vis the strength and willingness of our students to involve themselves in a 7-semester process replete with two-week summer intensives, practicum weekends, on-site mentoring sessions as well as several webinars each year. During this training, teachers are shown how they are making progress in meeting the requirements of the training through rubrics and guidance from mentors and instructors. These goals are identified through Gradalis Accountability & Evaluation approaches both of its students, as well as its instructors.

- **Annual Goals and Gradalis Improvements**

There have been and will continue to be significant changes in format from previous teacher training programming coupled with the offering of Gradalis-based Strategic Planning, Business Plan Development and related construction-financing assessments now available to School Boards and Administrations. This fiscal year completed (2015) called for adding mortar to ‘foundational’ goals laid many years prior. These essential structural building blocks have been refurbished and strengthened, deepened and broadened.



## GRADALIS PRESIDENT'S LETTER

The past year has been an active one for our organization. We hope you will have the opportunity to follow-up with us whether you have questions or would like to pursue working with us after reading this Annual Report and overview of our organization.

In addition to the clients served, our Stewards acting as our LLC "Board of Directors" (AKA Member-Managers) were very busy in 2015 with efforts to strengthen our organization and to reaffirm...**The Gradalis Mission Statement:** *Gradalis provides Anthroposophically-informed, high-quality professional development, Waldorf teacher training and consulting services that support healthy, sustainable, Waldorf school development.*

To this end these efforts included:

- ⊕ Review and update of the Gradalis Vision and Mission
- ⊕ Operating Agreement Terms (By-Laws)
- ⊕ Review and Update of Legal Venues – both in California and Colorado
- ⊕ Review and Update of Financial Reporting
- ⊕ Application for Membership with AWSNA, the Alliance and ACCET
- ⊕ Addition of four new Stewards (Guiding Members)
- ⊕ Recruitment of Waldorf-Trained Faculty
- ⊕ Creation of the Gradalis Advisory Board & Collegium
- ⊕ Contracts with Waldorf Schools –both existing & emerging – as well as individual Students (Waldorf Teachers in practice)
- ⊕ Development of an organizational plan

As you can see, we believe in operating the Gradalis organization as effectively and efficiently as conceivably possible. Gradalis is making itself available to provide services to teachers, administrators and school boards in both independent and public Waldorf schools throughout the country. We could not do this without the shared values and belief systems resonating within the commitment of our Stewards and Faculty Members.

Gradalis strives to always be in the top-tier of value-added tuition levels, affordable for practicing teachers and the extended support received from their school-employers. Completing its 2nd full year with horizons that show two to three full cohorts of from 20 to 25 teachers is well within possibility, upcoming in FY 2016. We are in communications not only in Colorado, California and Utah, but also Tennessee, Kentucky and Arizona.

Essentially by word of mouth, as they say, the beat goes on. To those of you not yet involved, please consider getting in touch with us as soon as you might.

*Thom Schaefer*

Thom Schaefer, Gradalis President

## **SECTION I. EXECUTIVE SUMMARY**

Gradalis LLC is a California Limited Liability Company (FY 2015) conducting its administrative and business services largely out of Colorado. This legal venue will change to a Colorado LLC in FY 2016. Gradalis is primarily a Waldorf teacher-training program whose doors are open to any qualified Waldorf teacher-student anywhere in the country.

Historically, the impetus and elements of “Gradalis” have been around since the 1970’s given that its Stewards have an extensive dedication working in the Waldorf educational and instructional field respectful of AWSNA (Association of Waldorf Schools of North America) respectively for well over 30 years. Gradalis LLC is a trans-disciplinary adult education model for the professional development of Waldorf Teachers and began training offerings in 1994.

The Educational Directors have successfully taken students through two four-year courses in Therapeutic and Early Childhood Waldorf Teacher Training—many of whom have gone on to become recognized leaders in their field. Gradalis offered preparatory courses for the grades every summer from 1994 through 1998. Rubrics and assessments, available for grades one through eight, are used in many schools across the United States.

Ms. Bonnie River, co-founder of Gradalis, developed and designed this Blended Learning model for Waldorf teacher training at two colleges—Touro University and Rudolf Steiner College—graduating 143 trained Waldorf teachers from their programs. Anthroposophical foundations are at the root of all trainings by Gradalis.

Gradalis has offered a full program to 14 students in 2015 as we have transitioned to training independent of Rudolf Steiner College—providing professional studies for class teachers in public and independent Waldorf schools, through a curriculum specializing in support for the working teacher. This curriculum is suitable for anyone seeking to become a Waldorf Teacher or who wants to develop his or her teaching capacities further. This training offers a unique therapeutic and remedial perspective in all facets of classroom teaching.

Gradalis Training™ provides an integrated curriculum over seven semesters with the following components:

- Philosophical foundations of Waldorf Education including the developmental aspects of human consciousness and evolving knowledge
- Inner development and transformative processes for the teacher
- Child development and changing consciousness early childhood through high school
- Waldorf curriculum from Kindergarten to Grade Eight (There are hopes for a high school component in the near future)
  - Curriculum content
  - Planning for block presentations

- Teacher-made assessments and Assessment tools
- Child Study and Student Study—SST, RTI, and IEP processes  
Movement Arts (Eurythmy, Spatial, Therapeutic)—Visual Arts—Vocal Arts  
Cultivating Waldorf Culture
- Festivals and school celebrations, cultivating pluralistic ethics
- Elements of health in faculty meetings
  - Study, art, focus on children
  - Behaviors fostering high trust
  - Theory U and meeting conduct
- Adult Education in Waldorf Schools in public school settings
- Waldorf in public schools and the 1<sup>st</sup> Amendment
- Waldorf in public schools and Threefold Social Ordering of Rudolf Steiner
- Cultivating a ‘Republic Academy’ approach (promoting inclusiveness) in governance of Waldorf in Public and Independent Schools
- Gradalis encourages tuition-free training of Pedagogical and Administrative Directors for schools enrolled in our courses.
- Waldorf-trained staff and teachers of participating Waldorf independent and Charter schools are welcome to audit various components of the program at minimal cost.

Gradalis provides an appropriate course of study to Waldorf-teachers using high-quality, courses of study to practicing teachers with state-of-the-art presentations and technology. Gradalis has established the highest standards of student achievement and educational standards using both distance-learning and regular contact among teacher-students and Gradalis staff.

Our wholehearted intent is to meet the educational needs of Teachers whose employer-Schools have decided to make a commitment to our educational model. Working closely with all teacher-training participants, the Gradalis faculty and administrative support staff are continuously overseeing our teacher-students’ schoolwork. Gradalis provides a custom-made curriculum, online instruction and feedback, as well as numerous support activities to ensure academic success. Our instructors take a personal interest in the success of each student.

## **SECTION II. MARKET ASSESSMENT OF THE NEED**

Gradalis’ Stewards are convinced there’s a “movement” in the educational field wherein the “Waldorf Culture’s” time is at hand. Call it “Situational Timing,” because anyone attuned to the “**Market Assessment of the Need for Waldorf Teacher Training, School Leadership, Board Training and Business Development**” knows there’s an open discussion everywhere.

Rudolf Steiner intended Waldorf education should be accessible – a matter of free choice for all children and families not determined by economic privilege or the government.

Many European governments subsidize independent schools making Waldorf education accessible. However, there's a **struggle of educational costs** being experienced by private-independent as well as public-charter Waldorf schools (Milwaukee being the 1<sup>st</sup> in 1991) throughout the U.S., all striving to keep tuitions and fees as low as possible.

What Rudolf Steiner envisioned in Stuttgart, Germany in 1919 for the 1<sup>st</sup> Waldorf School, is steadily becoming part of the educational consciousness over the last 3½ decades – substantiated by new discoveries in brain research – neurologically appropriate educational curricula. Today's greatest challenge to Waldorf education has been its rapid growth with new schools opening every year across the country. Consequently, there's an uptick in the **demand for trained Waldorf teachers** – i.e., demand exceeding supply. Moreover, there are new training programs developing throughout America inclusive of summer programs for teachers who desire to complete their training while they teach.

Then too, there's need for **School Administrator training** – administrators are seldom taught the complex issues facing them today, especially in the public realm—administrative basics as well as knowledge of “things Waldorf” – along with identifying common ground with public-charters' academic testing requirements. Most often there's little or no **Board training** with respect to fiduciary duties, organizational leadership, having added costs of mortgage and building maintenance, the conduct of meetings, H.R. and the distinctions of realms between governance and education's “cultural life.” Lack of Board member qualifications, orientation and training are common failings of Charter Schools – this holds true for Waldorf-oriented Boards as well.

But the most important task is Waldorf teacher preparation awakening and encouraging the **teacher's own inner development** through meditative practices and the arts. It's the teacher's own example of being on a ‘constant-growth’ pathway of self-development that communicates strongly to the soul of learning development of each student. The best example may be that public school teacher wanting to become Waldorf-trained bumping up against the challenging reality of finding a “blended” program of online webinars, classroom instruction, regional practicum weekends and 2-week summer venues. These basic practices inspire the Gradalis Mission Statement.

The **Gradalis Stewards** certainly have need for **optimism**, but that optimism is best – and most realistic – when it grows out of content that we ourselves build into our lives. Rudolf Steiner once made the following statement:

*“Our highest endeavor must be to develop free human beings, who are able of themselves to impart purpose and direction to their lives.”*

Schooling the Head, Heart and Hand, educating children so that they are able, as adults, to create a peaceful world – this leads to the **Guiding Principle of Gradalis** taken from Rudolf Steiner's practices.

*“Receive the children with reverence, educate them with love,  
Send them forth in freedom.”*

Gradalis rises to speak to this opportunity for the reasons of **Teacher Training, School Leadership, Board Training and School-Business Development** to begin to fulfill these needs and demands in its Strategic Plan's Goals.

### **SECTION III. VISION STATEMENT & ANNUAL MEASURABLE GOALS**

#### **VISION STATEMENT**

*GRADALIS supports the gradual unfolding of skills and capacities of the teacher and lays a strong foundation for Waldorf Education to manifest fully and with integrity into the world as a force for renewal of education in both the public and private sector. GRADALIS faculty members are experienced in Public and Independent Waldorf Education and commit fully to guiding schools who wish to manifest Waldorf Educational Practices and Principles while aligning with expectations of government mandates. To this end, we dedicate our work and efforts to benefit future generations who will be able to freely and of themselves impart purpose and direction to their lives for the benefit of humankind.*

#### **ANNUAL MEASURABLE GOALS**

**Goal #1.** Obtain Membership in and Certification by Association of Waldorf Schools of North America (AWSNA) & Accrediting Council for Continuing Education and Training (ACCET) to provide Certification offerings to Gradalis Students.

**Goal #2.** Establish, Market and Sustain Support for Consulting Services inclusive of Waldorf Schools both Independent and Charter-Funded in the areas of Governance Training, Administrative Training as well as Therapeutic Training.

**Goal #3.** To Cause Gradalis to be Officially Recognized, Respected and Accepted as a Credible, Effective Waldorf-Education Advocate and Strategic Partnering Organization.

### **SECTION III. SCHOOL IMPROVEMENT & STRATEGIC PLANNING**

Gradalis is well-aware that a critical aspect of improvement planning is the setting of targets and assessing how well they are met. Assessing those targets helps to determine the school's success in achieving measurable annual goals. Gradalis provides consulting expertise to support Boards and Administration as they work to describe the school's improvement planning process and how partially successful and unmet goals will be included in a school's Strategic Plan.

Gradalis has performed several S.W.O.T. sessions (i.e., Strengths, Weaknesses, Opportunities and Threats) in the school's programming for its future – subsequently set forth in that plan inclusive of enrollment goals and financial pro forma expectations. Many times this involves a school's site location/s so as to better serve different geographic areas of the region. A key result area is the involvement of the school's own staff in order to become proficient to administer and oversee growth.

#### **SECTION IV. QUALITY OF SCHOOL PROGRAMMING & DESIGN**

Gradalis is available to work with school leadership – Boards and Administrators – to undertake considerations of its own accountability system and whether there's need for an upgraded rigorous instructional program to meet the academic targets. Having experienced the development of Waldorf School's and Waldorf Charter School's curriculums and instructional practices and how they are being used to meet academic goals and standards for students, Gradalis is there if needed. Many times, just knowing there's mentorship available for those that have gone through these processes is enough.

An inquiry-based learning program providing feedback on a grade-by-grade basis in which teacher-students in training work in teams to solve problems that they may be dealing with in their own classrooms or that may arise in the future is another technique that is used. Teacher-Students are encouraged by Gradalis faculty to ask questions either during class or by participating in group discussion and messaging options via Gradalis Faculty Members. Each grade cohort provides pacing for the classes as well as clear and attainable objectives and goals which are tied to each Teacher-Student's needs and experiences.

#### **SECTION V. ACCOUNTABILITY**

Gradalis Faculty members are available as a Teacher-Student and or School Leadership might see fit using the most recent PSSA/PASA data, any locally developed tests and other data that reflects improved academic performance to support the educational effort. Gradalis is there to help the teachers help themselves, as it were, to help them determine how best to provide evidence of significantly improved or continual strong student performance in their classrooms.

Included in discussions and learning exchanges among faculty and with teachers-in-training, the following are used:

- Rubrics for instructors and students to use that provide clear expectations for the various aspects of the program.*
- Discussions on how survey and conversation results can influence development of annual measurable goals.*
- Gathering of Feedback from Students and Staff: How can these be used and what impact might they have on the curriculum? Are there any measurable goal decisions to be made that arise from this feedback?*
- Are we utilizing all opportunities to assure success of our students through descriptions of features of student progress plans—noting the usage of instructor/field mentor observations, surveys, portfolios or other local instruments to measure student progress?*

Gradalis is there to provide support and instruction to schools and administrators on how they might best identify and put strategies in place to assure student success. Those who are at-risk of failure, and those not making adequate progress, are directed with a clear plan for improvement and afforded the opportunity for success. Again, Gradalis has positioned itself to play a supportive role in helping schools to provide clear evidence that demonstrates how their strategies are proving effective in terms of improved academic performance. This may also include main features of a teacher evaluation plan whereat certain Gradalis Stewards can be retained to perform professional educational-staff evaluations

## **SECTION VI.GOVERNANCE**

Gradalis Stewards routinely attend national conferences and have participated in both the independent Waldorf associated meetings and conferences, as well as Charter School Symposiums – i.e., the Alliance for Waldorf Public Education (“Alliance”).

Gradalis Stewards’ extensive experience with an experiential understanding of how it is a Board of Trustees approves its policies and the framework for how they can be implemented in Gradalis has allowed us to move forward quickly in establishing our administration, training and services. Gradalis is fully aware of how to coordinate and collaborate ongoing reviews of the procedures and practices taking place as well as how recommendations are developed and approved.

As Governing Members of Gradalis LLC, Gradalis Stewards are there to support the coordination of Board Committee meetings where implementation guidelines are set forth in the respective policy manuals. This is where the coordination of documents is given to the members for effective review and discussion via meetings prior to actions being taken upon them.

Suffice it to say, Gradalis Stewards always recommend an inclusive conversation with all Gradalis stakeholders. Efforts in promoting opportunities for community, faculty and parent engagement in school activities have always been promoted and celebrated by Gradalis. Instruction in the operations of a school and its cultural wellbeing are an important part of the Gradalis program for teachers and schools.

## **SECTION VII. FINANCIAL STATEMENTS**

The sources and amounts of funds and listed significant operations include activities in FY 2015 only (Note: FY 2015 as of this writing has yet to be filed with the IRS). The main source of revenue is tuition paid for teacher training along with a pre-school program (Cedar Sage in Truckee, CA). Considered a transition year to solely move Gradalis operationally to Colorado, FY 2016, will have revised conduct of business locale and sole focus on the education of adults.

There have been no fund-raising donations or grant-writing received this year but these are planned for next year. There is Gradalis, Inc. (a Colorado-based not-for-profit organization – 501(c)(3) – since 2000). A Reserves account for budgeting for emergencies, shortfalls or delays in receiving monies is in place. Gradalis, LLC is in process for securing a \$25,000 line of credit at no interest for 9 months– credit card at Wells Fargo Bank. The Gradalis, LLC projected year-end reserve fund balance is budgeted for next Fiscal Year 2016 to commence at approximately \$35,000 and be maintained throughout the year.

This is a Stewards’ protocol used to maintain fiscal solvency having determined the amount of funds to be set-aside for unexpected expenditures and cash flow needs. Gradalis, LLC projects a 15% fund balance. These funds are continually re-invested in the growth of the Teacher Training – one day intending to be able to underwrite and offer scholarships.

Gradalis utilizes an accrual accounting system which integrates with schools contracting for their teacher training utilizing Generally Accepted Accounting Principles (GAAP) for budgeting, accounting and reporting. Gradalis and its CPAs use the accrual method utilizing QuickBooks Pro

which allows for 100% integration with Gradalis Chart of Accounts and in full compliance with GAA principles. Gradalis utilized the services of Richard L. Nairin, CPA of Thousand Oaks, CA for FY 2014 and prior years anticipating tax reporting for FY 2015. Beginning January 1, 2016, Income Tax Specialists, Inc. (John Smith, EA) of Northglenn, CO will provide CPA accounting and bookkeeping services.

Gradalis routinely updates its Five-Year Financial Pro-Forma depicting Teacher Training Programs, Board Training/Strategic Planning Sessions and Business Plan Production vis-à-vis Bond Financing/Capital Construction projects integrated into the marketing plans and the Gradalis Strategic Plan as it communicates and collaborates with Waldorf school clients.

**Gradalis Waldorf Consulting and Services LLC**  
**Profit & Loss SUMMARY**  
**Accrual Basis January through December 2015**

<b>Revenue</b>	
Consulting	88,468
Refunds	254
Tuition	163,067
Uncategorized Income	<u>3,369</u>
Total Income	255,158
<b>Expenses</b>	
Teacher Training & Travel	32,660
Admin & Office Overhead	5,815
Salaries, Wages & Payroll Costs	83,700
Professional Fees	29,383
Rent & Building Costs	29,963
Other Operational Costs	<u>6,725</u>
Total Expense	188,246
<b>Net Revenue/ (Expense)</b>	<b>66,912</b>
<b>(Fund Balance Reserve, Deposits &amp; Advance Payments)</b>	

## **SECTION VIII. ADMINISTRATIVE ACTIVITIES**

The quality of Gradalis teaching and other staff supports involve the collaboration of nearly 30 years experience by Waldorf educators. Gradalis enjoys very low staff turnover and retention patterns are long-term – the respect and knowledge of who Gradalis represents in the Waldorf educational circles continues unabated through the years. This “team” extends to the Advisory Board and Collegium of Gradalis with certified and non-certified professional faculty members and artists experienced in teaching, as specialists or having had extensive administrative responsibilities in schools and colleges.

The Gradalis training approach is Unique. It assists teachers and schools seeking to train their teachers in 3 major ways:

1. Offering a program of quality teacher training for a fraction of the cost
2. Adding components that support the working teacher and administrator in main lesson development and leadership work through webinars focused on this practical work throughout the school year
3. Including all aspects of training that provide content needed for personal transformation through coursework and support in Rudolf Steiner’s Anthroposophical foundations and understanding of the development of the human being, as well as Inner Development to guide our students

### **Conclusion of 2015 Annual Report:**

2015 has been a year of growth and expectation for Gradalis. Stewards have guided the process through meetings and intense communications, clarifying strategic goals, and establishing the Gradalis name in recognition of many years of dedication and work on the part of our Stewards and Faculty within the Waldorf movement. We continue to contribute to the development of Waldorf education through our ability to see what is coming toward us out of the future with regards to the growth of Waldorf education in the United States of America. Gradalis has responded to this need for trained teachers who are currently teaching in Waldorf classrooms so they might understand what lies behind Waldorf education and receive support for the planning of main lessons that directly serve their students. As well, we provide training for Boards and governors of these schools. Such training can assure that school governance is carefully carried out and this great responsibility accepting with an appropriate understanding of how to govern and administer schools while protecting and guiding their schools based on Waldorf principles. Such is the content of our Gradalis programs taught in service to the Waldorf movement.