

Rudolf Steiner School Trust (Wellington)

ANNUAL APPEAL

SPECIAL CHARACTER FINANCIAL PROMISES FOR 2012

"The healthy social life is found when in the mirror of each human soul, the whole community finds its reflection, and when in the community, the virtue of each one is living".

Rudolf Steiner 1861-1925

Dear Parents and Friends,

Raphael House is now undertaking its annual planning processes for next year. This involves both the Board of Trustees (BOT) and the Trust (as proprietor) agreeing the educational and development goals for the coming year. Together with this is a budget which is a statement of how this will be resourced.

We need your help, support and goodwill to complete this process.



BACKGROUND TO THE SPECIAL CHARACTER CONTRIBUTION (SCC)

We thought some background information might be helpful in understanding the basis of the Special Character Contribution. This year we are looking for a renewed commitment to this way of funding the school and thereby ensuring its ongoing financial wellbeing. In this way it is also something of a special appeal.

When Raphael House integrated the school became a part of the state education system but with a Deed of Agreement with the Crown that its special character as a Waldorf school would be recognised and protected.

A covenant was entered into with the community that it would continue to accept responsibility for this special character. One aspect of this is the financial wellbeing of the school. This 'connection with the special character' as it is known, continues as a condition of enrolment under the 'preference of enrolment' clause in the Deed of Agreement.

On this basis it was also agreed that financial contributions would be based on a 'gifting' system. This was a reflection of a learning community and seen as a community of gifts for

the benefit of all the children in the community. This was also seen as consistent with the 'social ethic' verse quoted above.

From a pragmatic perspective this also meant that financial contributions would not attract GST (now 15%). They do attract a tax credit as they are regarded by Inland Revenue as a donation to a charitable institution for tax purposes. This seemed to make sense to everyone.

The community is responsible for provision of facilities and buildings from its own resources and they are to be constructed in accordance with the State codes. The community accepted this reality at the time of integration and we are still working together to provide this. We are very proud of what we have achieved however we still have some way to go. We look to each generation to leave a legacy for the future and those who follow, just as we now enjoy the facilities provided by those who came before us.

The alternative would be to borrow money to complete the school (to code) and charge parents a compulsory fee (attendance due) which would be legally enforceable (and entitle the school to expel a pupil if not paid), add GST and remove the tax deductibility. In addition, we would still need to ask for 'donations'. **The Area School model, as funded by the Ministry of Education, is not sufficient to support the depth and breadth of a Waldorf education.**

REVIEW

This year we have reviewed the contribution system and consulted with you about the best way forward. The feedback we've had is to continue with the current gifting system and we would like to do that as it so obviously benefits everyone.

We have also heard the message about being more transparent and consultative and aim to make further progress in this respect. This includes being clear about what Special Character contributions fund, as distinct from pledging for major developments which are specifically campaign orientated. We are always happy to provide any specific information on request. Please contact Chloe, phone 576-2339.



RENEWING THE GIFTING SYSTEM

The success of the gifting system depends on each member of the community accepting responsibility for it and honouring their commitment to the Special Character.

At the time of integration an amount was agreed on; based on the needs of the school. Part of the agreement was that this would then be increased annually, based on the annual rate of inflation (CPI). We would now like to return to this basis, which was changed several years ago. Based on successive increases to the CPI since then this would give an 'indicative' figure of **\$3,000 per child for next year** rather than the \$3765 asked for since 2008. Again, you have indicated that you would prefer this.

WHAT IS AN 'INDICATIVE' FIGURE?

The 'indicative' figure is simply a base figure and is an average per child across the school student population of what is needed to fund the services, fixed costs and development goals for the following year. Please remember this is not in the nature of a fee as you can't really put a price on the value of education as education is essentially a cultural activity. This allows those who wish, and are able, to gift more; as a way of supporting those who are unable to do so from time to time. This allows for individual freedom which in turn also supports individual responsibility. In this way the average can be achieved and the whole community benefits.

At the present time we are receiving 65% of the possible gifting amount which is causing us to ask whether the community really wishes to continue with the gifting system. We certainly hope so, however this is dependent on the community response to this year's appeal.

OTHER FEEDBACK



Some parents were surprised that there were some in the community who had chosen to withhold their gift because they had unresolved issues with the school. This was seen as being unacceptable as it simply penalised the whole community, and in particular the children. It is also inconsistent with the spirit of community gifting. The school has policies and processes for dealing with issues and complaints and these should be followed.

Another area of surprise was that there appeared to be some who considered they did not need to gift as Raphael House is a state school and the state provides the funding to run the school. Again, as can be seen from

the above information, this is erroneous as the state does not provide buildings and infrastructure or sufficient funding for a Waldorf education. (financial notes enclosed, see Appendix A). We also have a choice as a community, namely to fund the school as a community of gifts and support one another as a community, or, alternatively, change to compulsory attendance dues with the implications already outlined.

The compulsory option, of course, would be easier to administer. However, it has been clearly stated that we wish to continue to operate financially as a gifting community and therefore some checks and balances need to be in place on behalf of the community. These checks and balances should reflect the responsibility a family has to the community and therefore the Finance Policy is also being reviewed. This will include the processes the Trust will follow on behalf of the community and what should happen when a family does not adhere to the policy.

We welcome your comments and feedback and will shortly be convening a community focus group to review and develop this policy.

WHAT DO I NEED TO DO NOW?



We ask that you complete the enclosed Special Character Promise form after carefully considering the needs of the school and what this means for your family and child(ren). Please consider what you can contribute bearing in mind that the \$3,000 is an indicative figure and if you are able to contribute more please do so, so that the average is maintained.

