

RUDOLF STEINER SCHOOL TRUST

UPDATE REPORT

October 2009

**Report to Raphael House School community on Trust activities
(including the Proprietor's Executive Group), for 2009, year to date**

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Introduction

This report is the first of regular communication the Trust will initiate through the School's website. The update covers the work of both the Trust and the Proprietors' Executive Group (PEG) during this period of 2009.

Future updates will appear on the website and will be notified through the Bush Telegraph.

In response to a request at the previous community meeting, there will shortly be additional notes to the Trust's 2008 Annual Accounts providing finer detail on expenditure items.

The Trust's Vision

Earlier this year the Trust published a policy document outlining our roles and functions. In that document we made this statement:

Trust Vision

The Trust's carries a vision of the spiritual context and purpose that stands behind Raphael House. This includes the understanding that as a Rudolf Steiner/Waldorf School we must, as modern educators and parents, know and understand our students-body, soul and spirit. From this perspective we work to strengthen their unfolding as healthy, balanced and self empowered individuals. From this basis they may have confidence that they stand in a meaningful, ethical and significant relationship to the world around them.

'Receive the children in reverence, education them in love, let them go forth in freedom'. Rudolf Steiner

As Raphael House enters a new phase of development, the need for clarity in roles and relationships, and transparency in processes, is of paramount importance. With the increasing complexity of our School, it can be a challenge not to lose sight of the "Being", the spirit, of Raphael House. Maintaining our collective enthusiasm for, and engagement with, the School is vital to its well-being. As a Trust, we are committed to seeing the spirit of the School, and the Waldorf education it offers, alive and well.

The increasing number of children with learning difficulties throughout New Zealand's schools confirms the wisdom of an education system based on an anthroposophical view of childhood and learning. In this light, we wish to strengthen the curative education offered at Raphael House (Eurythmy, the Extra Lesson programme and other therapy work). Unassisted, these children often affect their social and learning environment detrimentally. With the right help they can learn effectively and make positive social contributions.

With a predicted downturn in school rolls in the Hutt Valley region, the Trust sees the need to maintain a high public profile. Raphael House offers a unique education which we believe becomes more and more relevant in meeting the needs of children seeking to maintain their spiritual roots as they enter our modern, materialistic culture. We see our task as helping to deepen the anthroposophical basis of Steiner education throughout the Wellington region and in so doing, maintaining the long-term viability of our School. Managing future growth in the region is a key issue.

Governance Structure

As discussed at a community meeting earlier this year, the governance and operational groups have been meeting to discuss the organisational structures that are most appropriate for the School's "age and stage". Trust and PEG members have participated in this process to ensure that the Proprietors' interests are reflected in these discussions.

- **The Trust's Key Tasks**

The Trust has responsibilities in three key areas.

1. Special Character: a legal responsibility, under integration, to maintain and uphold the integrity of Steiner/Waldorf education at Raphael House.
2. Property: to provide land and buildings.
3. Funding: to seek donations and co-ordinate fundraising activities for the development and maintenance of Trust-owned land and buildings.

Additionally, the Trust's Deed and the Integration Agreement define the legal responsibilities of PEG, as a sub-committee of the Trust. The delegated powers bestowed by the Trust permit PEG to raise and manage funds and conduct various operational tasks for the Trust, which support its business and special character activities.

The impacts of the concerns expressed by some parents at the end of 2008, which continued through this year, have significantly affected progress on many of the issues for which we are responsible. The matters raised by a section of the community have drawn the Trust's and PEG's attention to a range of structural and operational aspects of its processes that have required action. Most were already under discussion or consideration and this work is continuing.

Subsequently, the Trust has been reviewing its own processes. This has included recent conversations with the Proprietors' representatives on the BoT. The aim is to ensure clarity about the expectations the Trust has for the provision of special character and property matters and to agree on reporting lines and processes.

- **Trust Membership**

This year Dr Rene de Monchy has joined us. Rene has a long association with Raphael House as a parent and as the school's first doctor. He has often lectured in adult education and is well known to many school parents. He brings a wealth of experience from his interest in uniting the medical and educational understandings of child development.

Trust members: Peter Butchers, Rene de Monchy, Paul Denford, Tana Lyons and Janet Thomson. Tana Lyons is currently on study leave.

- **PEG Membership**

During this year, there have been a number of changes in PEG membership. Steve Brown ended his 16 year association with the School in April. His financial expertise has been a valued contribution to PEG's work over a number of years. Regrettably, Helena Tobin resigned in August due to the pressure of her commitments. We were

pleased to have been able to appoint Andrew Fisher. Andrew brings useful experience in building and construction from a background in quantity surveying.

PEG members are now Alan Chapman (Chair), Paul Denford (Trustee) Chris Penman, and Andrew Fisher. Also attending, ex officio are Karen Brice-Gear (School Coordinator/Principal) and Chloe Kasoulides (Executive Officer).

Additionally, Paul Kirby and Adrian von Aesch have now been formally appointed as the Proprietors' representatives on the Board of Trustees. As mentioned already, work is in hand to define the Trust's expectations that will be encompassed in this role.

Key Task 1. Special Character

The Trust and College of Teachers have this year worked on developing a Memorandum of Understanding which acknowledges the need for clearly defined roles and responsibilities with respect to special character, given the gradual shift away from joint membership over recent years.

The Trust confirms and supports the College's role as the pedagogical leaders of the School. We confirm our shared interest in ensuring the well-being of Steiner education at Raphael House. The trust will be focussing on enrolment, parent curriculum and teacher supply and development issues.

We welcome the initiative taken by the Adult Education group in coordinating Parent Curriculum work which will help strengthen parent understanding and commitment to Steiner education.

Maori language has had a chequered path at Raphael House. Attracting and retaining teachers has often been difficult. We applaud the initiative of the parents who are supporting this bicultural initiative. This is an important aspect of our New Zealand heritage which must find its place in the educational experience of our children. There is much to be shared, too, in the meeting of Maori spiritual heritage and the spiritual basis of Steiner education.

Key Task 2. Property

The planned Upper School completion was placed on hold pending anticipated government funding, estimated to be as much as \$2m, and concerns from some in the School community. With the current recession and tighter government (and community) purse strings, it is more likely to be 2010 before we can expect any positive movement in this direction. A difficulty we face is that any building we undertake ourselves, without government funding, reduces our future entitlement, which is based on a square metre formula. Raphael House is currently under the state equivalency by approximately 1000m².

The Building Development Group,(a PEG mandated group) on behalf of the Proprietors, has been monitoring other property improvement tasks to ensure that every opportunity to maintain the Schools' developmental momentum is utilized. Paramount amongst these tasks is to draft a Property Development Strategic Plan, covering not only the planned buildings (as previously indicated in the "Whole School Plan") but also the options for land on the upper levels of the property. A

consultation process for the land is being planned now which will involve the faculty and the parent community.

In the meantime, possible short term solutions are being considered and the building priorities are being reviewed.

The Community House project, at 38 Matuhi Street, is still on hold pending the availability of funds. An estimated \$47,000 is needed to make the necessary alterations to meet Council consent requirements. The house is currently rented to a school family who are also caring for the school costumes.

Early Childhood Centre: As part of the process for chartering and registering the Kindergarten as an Early Childhood Centre, extensive, and expensive, renovations have been required. These upgrades are now substantially completed to meet compliance requirements, notably with the recent, and donated, work done by a group of parents on fencing modifications.

Key Task 3. Funding and Finances

Central to the issues addressed this year has been managing funding for the Trust's budget and the contribution possible to the Board of Trustees' (BoT's) budget. Given the slowness of Special Character Contribution (SCC) form returns, the apparent result of both the changed circumstances facing many families and those withholding their donations, it became very difficult to plan effectively. This left PEG needing to adopt a conservative approach to its financial planning advice on the amount the Trust could commit to contribute to the BoT. Depending on year-end returns for the SCC, PEG has recommended that the Trust allows room to contribute additional funds by year end, after having first met its own basic costs and commitments related to property and special character interests. The Trust's special appeal in May was generously responded to by 45 families and some \$32,000 extra was pledged.

Another focus this year has been to get financial reports of sufficient quality to inform decision making and have auditing of accounts up to-date. With the mammoth efforts of Chloe Kasoulides, the School's Executive Officer, this has now been made possible. The 2008 accounts are now audited and, along with recent year's accounts, are on the School's website. A number of accounting errors and omissions from previous years are also being amended to ensure that the Trust's accounts are accurate and transparent. As is normal business practice, this year we are changing our auditor and have engaged Deloitte for both the Trust and BoT future audits.

We have also had a number of discussions about the most appropriate way to seek community funding. The option of Attendance Dues has again been considered, given encouragements from the MoE's advisers, and the reluctance amongst some in the community currently to make donations. The decision has been made, again, not to go down this path for 2010. The ethos of gifting is still a high priority for the Trust and the extra expense to parents (due to the addition of GST and lack of tax credits on Attendance Dues) does not seem justifiable. This remains a future option, however, should this be the only viable way for the Trust to fund the development of the buildings indicated by the CoT as being necessary to meet student requirements.

At the end of August, SCC pledges amounted to \$483,000 and we have received so far \$574,000 (which includes \$24,000 for pre 2009 SCC and \$32,000 from the Trust's May funding appeal). If current amounts pledged by year end are received, we expect to receive \$838,000.

For 2010 it is hoped to define a clearer relationship between community funding and school needs. This is likely to be expressed in the form of an explicit social contract. It is unmanageable and unsustainable to provide the services necessary annually with uncertain funding.

Fundraising

A Fundraising Group has been reactivated to assist in diversifying our funding sources. The Group, mandated by PEG, are developing short-term and long term fundraising proposals. They have already started activity in recent weeks with a Garage Sale.

The Ministry of Education and Raphael House

- **Appointment of Specialist Adviser**

In February, the BoT requested the MoE to appoint a specialist adviser to assist in all aspects of school administration. Malcolm Baxter filled this appointment. His reports and recommendations have been widely circulated. The Trustees have found his advice positive and constructive as the School works through the transition into the next phase of its development. As noted elsewhere, many of the difficulties we have faced this year are evolutionary in nature and can be resolved through good review processes and dialogue between the different governance and management groups, with the engagement of the parent community.

- **Appointment of Limited Statutory Manager**

In June, Ken Wilson was appointed by the MoE to this position with specific authority over BoT finance and personnel. His advice has been very constructive and his reports circulated widely.

Communication

How to improve the sharing of information and communication between governance bodies and with the community has been a longstanding PEG conversation. A job description for a paid Marketing/Communications role had been prepared early in 2008, after first being identified as a need in 2007. This was found to be unaffordable, given available funding, and was shelved, leaving the tasks dependent on existing volunteer input. Currently a communication plan is being developed for the whole school with the assistance of an external adviser and a number of research projects are under active consideration, also with specialist advice.

Networks

The Trust and PEG share in the network for integrated schools that is provided by the Association of Integrated Schools and the Association of Proprietors of Integrated Schools. This has been an important source of information on the policy, compliance

and operational requirements that come with state funding. The annual AIS/APIS conference, held in June this year, is also a useful opportunity to meet with other integrated schools, to hear and discuss common their issues and learn from best practice stories.

Regional Strategy

To date we have had an excellent rapport with Te Ra School and their students and families going into Class 8 at Raphael House. This has been a real bonus. Similarly, the Thorndon Kindergarten and the Alectown Steiner Childcare Centre have been wonderful stepping stones to our Class 1. The Trust will be actively seeking their combined support in developing a regional strategy for Steiner education in the area. The long-term viability of Raphael House is closely linked with their destinies.

Experience overseas shows that as an organisation grows, such as a school, it attracts other anthroposophical activities (cultural, artistic, therapeutic, bio dynamic, etc). Encouraging a network of anthroposophically based initiatives will strengthen our school community and bring benefits to the School and students is an anticipated task that the Trust will actively foster.

Working with the Board of Trustees

The BoT is charged with responsibility for developing Raphael House's special character. Following a wish expressed by BoT members to be better informed on special characters aspects of our School, the Trust has begun an "in-service course" in Waldorf education at the beginning of each board meeting. This has exciting possibilities and real potential to strengthen the understanding of special character implications. We welcome the opportunity and look forward to working more closely with the BoT.

To this end the Trust has determined to establish this closer working relationship with the BoT through its Proprietors' Representatives, in the interests of "sharing the load" and better integrating the Trust' interests into the whole School.

These working relationships will be supported through regular and comprehensive reporting based on clearly enunciated expectations.

Joint strategic thinking will be the key focus to mesh our efforts in several key areas, such as communications, enrolment, research, organisational development, and the provision of buildings and facilities.

Working with the Parents, Teachers and Friends Association

Recently the Trust met with the PTFA and discussed several matters of common interest, such as the role of the Association. This was a very positive meeting which opened up avenues for future co-operation which the Trust anticipates with enthusiasm.

Looking forward to 2010

Raphael House has a great mission to accomplish. The Trustees are determined in our vision.

The challenges faced in this year and the remedial actions now taken or planned will see the School enter 2010 in a much stronger position than has been possible over the last two years. It is hoped that the efforts made by the governance and operational groups to better inform and reassure the community will lead to a more supportive response in 2010. The SCC receipts will be an important indicator of the Trust's ability to realise its plans.

As a community, our positive thoughts and actions will help our teachers and children succeed.

“May all our goodwill strengthen the heart of Raphael House to work in the light of its true purpose.” (Trustees, July 2009).



Paul Denford
On behalf of the Trust



Alan Chapman
Chair, Proprietors' Executive Group