



Emerson Waldorf School

Education rooted in Truth, Beauty and Goodness

Waldorf Educational Association
of North Carolina, Inc.

Annual Report **2009-2010**

All School Meeting
October 21, 2010
7:00 pm



Table of Contents

<i>Board of Directors</i>	3
<i>College of Teachers</i>	4
<i>Administration</i>	6
<i>Parent Organization</i>	7
<i>Treasurer's Report</i>	8
<i>Enrollment and Outreach</i>	10
<i>Development Report</i>	11
<i>Annual Fund Donors</i>	12
<i>25th Anniversary Photos</i>	15
<i>Acknowledgements</i>	16

Illustrations in the *Annual Report* include main lesson book artwork and sculpture rendered by the students in the EWS High School.

The *Annual Report* was prepared by the Board of Directors and distributed at the All School Meeting (General Meeting of the Corporation) on October 21, 2010.

Mission Statement

Emerson Waldorf School provides an integrated Waldorf curriculum and environment which encourage and promote independent thinking and social responsibility, as well as academic and artistic excellence.

The unique gifts and contributions of each child are honored through a developmentally appropriate awakening of thinking, feeling and willing.

Further, the Emerson Waldorf School understands children as beings of body, soul, and spirit, and guides them to develop compassion and reverence for themselves and the world community.

Board of Directors



In our 25th Anniversary year, the Board of Directors was pleased to support and participate in the following projects that have prepared a strong foundation for launch into the next quarter century!

- *Completion of a two-year long Self Study that focused on all aspects of school governance, operations, curriculum and student life.* This study includes not only a statement of all that we have achieved to date but also an analysis of how we want to expand and improve over the next few years.
- *Completion of a five-year strategic plan led by the Long Range Planning Committee.* The implementation plan has two phases that allow us to concentrate our planning efforts on how we can grow the programs, personnel and facilities with modest financial support and within the scope of our yearly operating budgets.
- *Completion of a comprehensive campus development plan led by the Campus Planning Committee.* This plan will soon be filed with Orange County allowing us proper authorization to incrementally build out our 54-acre campus to hold our ever-expanding programs, faculty and students. (Several small facility renovations/improvements have already been started—and many finished—following the campus development vision.) The Campus Planning Committee also led the school's response to the proposed (and defeated) placement of a Waste Transfer Station adjacent to the EWS Farm property.
- *Completion of a five-year fund development plan to guide philanthropic investment and community building activities in our school and local communities led by the Fund Development Committee.* The 2009-2010 Annual Fund campaign achieved 96% community participation (including 100% from faculty, staff, and Board) and instituted a new giving circle.
- *Strengthened the school's financial and legal processes.* An Audit Committee was mandated, staffed, and tasked with overseeing the school's first financial audit; Joanne Andruscavage and Tara Furze improved the business office operations congruent with proper accounting practices; and the Legal Affairs Committee instituted a rolling 3-year legal review process designed to ensure that our operation remains in compliance with local, state and federal requirements.

2009-2010 Board of Directors: Liz Alway (Parent Rep), Joanne Andruscavage, Ingeborg Boesch (College), Karla Boyce-Awai, Georg Buehler, Patricia Cornell (College and Vice President), Erin Hoeg, Mark Hulbert (Treasurer), Dee Anne Lamb, Carol Mahaffey, Leigh Matthews (President), Richard Schmalbeck, Mike Senkpiel and Charlie Viles (Secretary)

—Leigh Matthews, President, Board of Directors

College of Teachers

The 2009-2010 school year was remarkable in many ways for the Emerson Waldorf School. In March of 2010 the school was accredited by the Southern Association of Independent Schools and the Southern Association of Colleges and Schools. The Board, College and Administration also completed a Long Range Plan that will help guide much of the school's work for the next five years.

PROGRAM DEVELOPMENT & STRATEGIC PLANNING

During the 2009-2010 school year, the College progressed steadily with its stated program goals. The first identified area of need addressed was student support. Connie Helms was brought in to do Extra Lesson blocks. In the spring of 2010, the College created a new position of Educational Support Specialist and hired Katie Reily to start in the fall of 2010. The College also created the role of Classroom Assistant and hired Shannon O'Connor to start in the fall of 2010. Kim John Payne and Leslie Diaz of the Center for Social Sustainability led a fall social inclusion in-service for teachers, and the teachers had a second in-service day dedicated to social inclusion work in the spring.

The second program goal the College addressed was the need for Eurythmy at the school. The College hired Brigida Baldzun to teach blocks in both the high school and lower school. Her work was very well received, and the College offered her a full time position to begin in the fall of 2010. Her other commitments make it impossible for her to join our faculty full time; but the College did schedule more Eurythmy blocks with her for the 2010-2011 year, and hopes that Ms. Baldzun will join our faculty full time in the long run.

COLLEGE OF TEACHERS AS EMPLOYER

The College successfully completed all first year teacher evaluations as well as evaluations for seasoned teachers, as outlined in our Professional Development Handbook. Astrid MacLean and Peter Snow, both of the Edinburgh Waldorf School, visited to conduct evaluations.

Hiring for the 2010-2011 year began in January of 2010. We were able to attract a substantial pool of qualified, Waldorf trained applicants. The College was able to meet all of its hiring needs with qualified, trained and experienced teachers.

LEADERSHIP & GOVERNANCE

The faculty committee structure functioned successfully all year, and faculty



members were very pleased with its efficacy. At the end of the school year, the College created some new roles within the College to help distribute the work formerly done by the College Chair: corresponding secretary (Ingeborg Boesch), reporting secretary (Nancy Balasubramanian), scheduling/tracking secretary

(Kathleen Stone-Michael) and pedagogical chair (Ameli Fairman-Evans). The College named Patricia Cornell as college chair to begin in the fall of 2010. The new supporting roles allow the Chairperson to be more available as a point person for the community and between the governing bodies of the school.

None of our work would have been possible, however, without the constant support, encouragement and collaboration of our outstanding Board of Directors and Administrator.

2009-2010 College of Teachers: Joanne Andruscavage, Nancy Balasubramanian, Ingeborg Boesch, Jason Child (Chair), Patricia Cornell, Ameli Fairman-Evans, Judy Grant, Carol Kubik, Whitney MacDonald, Robin Olson, Kathleen Stone-Michael, Rob Rich, and Benjamin Trueblood

—*Jason Child, Chair, College of Teachers*

Administration

The Emerson Waldorf School has been “enthusiastically and without reservation” accredited by the Southern Association of Independent Schools and the Southern Association of Colleges and Schools.

During the 2009-2010 school year, Faculty, Staff, Board and parents studied every aspect of the school and articulated our strengths and challenges. A team of our peers visited the school for 3 days to review our work, commend our efforts and offer recommendations for improvement. As part of a five year cyclical process, we will report on our progress in 2012 and 2015 when the cycle begins again. Milestones associated with this effort included commitment to an annual audit of our finances, clear articulation of our curriculum both by grade and by subject, and the collection and publication of our school’s policies and procedures. All this in the year that we celebrated our 25th Anniversary!



Accreditation allows us access to local and national resources that will serve us well as we begin the next 25 years. It also allows our high school students to display this designation on their transcripts and provides colleges with the knowledge of the quality of our programs.

Our thanks go out to all those who participated in this project at all levels: parents who attended focus groups and participated in surveys, Faculty and Staff who worked on the review, the Steering Committee who managed the details, and of course, the talented young people who represent our school so beautifully to the greater community.

It will be difficult to match or exceed the achievements of the past year, but we are moving forward, developing new programs, improving our practices, and striving to provide the highest quality Waldorf education for every child.

Blessings on our school!

2009-2010 Administrative Staff: Mary Leonhardi, Alice Armstrong, Kelley Wiley, Tara Furze, Julie Brown, Leigh Sparacino, and Ian Ostrowski

—*Joanne Andruscavage, Director of Administration*

Parent Organization



Reprinted from *The Gnome News*
June 9, 2010:

What a great year it has been: numerous lectures and *Renewal* magazine to engage our heads, joyous picnics with yummy food and good company to fill our hearts, and contra dancing, lazure painting, gardening and many other activities to busy our hands and feet!

The Parent Organization was able to accomplish these and other beneficial projects because of support it received from our wonderful community.

There are many people to thank, and top on that list is Corey Alicks, who went far

beyond her position as Hands chairperson to make possible numerous P.O. endeavors this year. Therisa Pienaar also tirelessly helped us with many projects, as did Anne Marie LaLumia and Leigh Sparacino. Without Kelley Wiley's sharp eye and great patience, there would be no communication between the P.O. leadership and the P.O. itself. Ian Ostrowski worked many, many hours (many of these hours could be called last minute hours!) to make sure things were done that insured our success.

With this said, it seems that there is no one to step forward to assume any of the leadership roles for next year's P.O. Perhaps the EWS community needs a little hiatus from the P.O. Effective immediately, the P.O. will be in a state of dissolution. In any growing community such as ours, change is the only thing that can be consistently expected, and I'm confident the P.O. will reemerge renewed as a (once again) changed entity that meets the current needs of our wonderful parent community.

I'd like to thank you all for the opportunity I was given to serve this beautiful community for the past two years.

—Will Hicks, *President, Parent Organization*

Treasurer's Report

The dominant development in the financial life of EWS this past year was the completion of the school's financial audit, the first in the school's history. Its completion required even more hard work than we already had known would be involved, and thanks go in particular to Tara Furze, our Business Manager, for countless hours of work to help make it happen.

There is much to celebrate in the auditors' report, and in what follows I will briefly review their findings. But the auditors also identified several areas in the financial management of EWS to which we will need to pay more than the usual amount of attention in coming years, and in what follows I want to briefly mention those, too. WEANC members who would like a copy of the audit should contact Tara Furze in the front office.

Highlights of what the audit found for the year ending June 30, 2009 include:

- Net assets (total assets minus liabilities) equaled \$1.498 million. We are a wealthy institution!
- Though wealthy, we are what many describe as a “land rich, cash poor” institution: The lion's share of the school's assets is in so-called “real” assets—land and buildings.
- Though we may be “cash poor,” we're not as cash poor as in previous years. The audit shows that the school has accumulated nearly \$400,000 in liquid financial assets. The bulk of this amount is in the form of temporarily restricted or Board restricted accounts: \$151K for facilities maintenance, for example; \$140K in a scholarship endowment; \$27K for Eurythmy!

One of the biggest challenges in our financial management that the auditors have identified is in the area of maintaining our physical plant. They calculate that our buildings and other real assets suffer depreciation each year in the amount of \$74K.

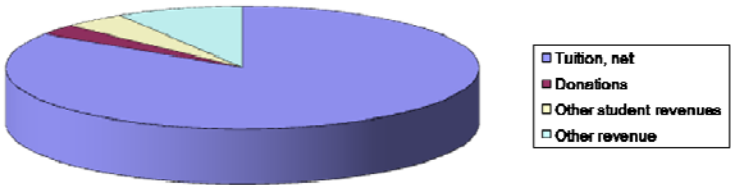
- One way of putting that in context: We need to spend \$74K each year reinvesting in our physical plant in order to prevent the overall net worth of EWS from declining just through depreciation—wear and tear, and so forth.
- This also means that the school has an enormous amount of accumulated depreciation from prior years. It will be imperative in coming years that the school's management address this issue.

Accounting for depreciation is not just a bookkeeping entry, needless to say, but has real world consequences as well. One of the auditors' recommendations is that we put a line item in our annual operating budget for depreciation—something that in previous years had not been done. Upon doing that for the academic year ending June 30, 2010, for example, the school shows an operating deficit of approximately \$48K².

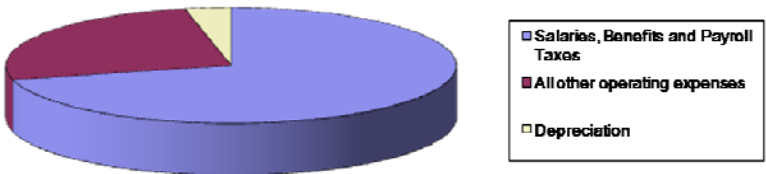
The good news is that, due to increasing enrollment and more efficient administration of the school's finances, the 2010-2011 budget is in balance even after accounting for depreciation.

—Mark Hulbert, Treasurer, Board of Directors

2009-2010 Income: \$2.191 million



2009-2010 Expenses: \$2.238 million



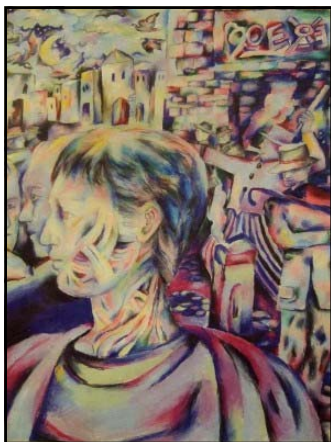
¹ Approximately \$10K of this Eurythmy fund was spent in the 2009-2010 school year to pay for block instruction in Eurythmy, taught by Brigida Balaszun. Approximately \$15K is budgeted to be spent in the current academic year as well.

² Another contributing factor to last year's deficit, besides depreciation, was the unexpectedly large cost of our audit.

Enrollment and Outreach

Enrollment is growing at the Emerson Waldorf School. We welcomed 49 new students for the 2009-2010 academic year: 23 in our Early Childhood program, 21 in the Grades and 5 in the High School. We held monthly Campus Tours and three Open Houses and attended numerous events to distribute information about Emerson Waldorf School.

Word-of-mouth continues to be our most effective outreach, as members of our enthusiastic parent body tell their friends about the wonderful education their children receive at EWS. We also attract new families each year moving to the Triangle, many from other Waldorf Schools.



Other Outreach activities this year included the following:

- New *Facebook* and *You Tube* pages to post pictures and videos of school activities and an EWS Blog for parents to discuss Waldorf Education
- Numerous speakers throughout the year, including our 25th Anniversary Lecture Series, Waldorf Education Day (*Waldorf and the Media*), and talks on Adolescence, Learning Differences, Biodynamic Gardening, and *Simplicity Parenting*
- A new Puppet Show series for our own young students and other 3-7 year olds throughout the Triangle, and a new Puppetry Video on our website and *You Tube*
- A new *Simplicity Parenting* workshop series, which attracts the public to EWS to discuss parenting issues (run by parent, Raelee Peirce)
- A new program for International Visiting Students
- Promotion of other EWS events, such as the Holiday Fair, High School plays, musical performances, etc. The EWS String Band played at Shakori Hills and the Jazz Band played at the Community Dinner.
- A new video promoting the High School (still in production)
- Numerous newspaper and magazine articles about EWS throughout the year, including a special feature in the *Herald* on our 25th Anniversary

—*Alice Armstrong, Director of Marketing and Outreach*

Development Report



Our 25th Anniversary year was a successful one for fundraising and development activities. With no Development Director on staff, the Board and Administration developed a vision for the year and organized the activities with the generous help of many dedicated volunteers.

Development income for the year was \$137,000 and expenses were \$59,000. The following are income totals for each activity:

Annual Fund	\$61,000
Dinner/Silent Auction	\$ 7,000
Golf Tournament	\$15,000
Holiday Faire	\$15,000
Scrip Sales	\$36,000
Other	\$ 3,000

We are pleased to announce that the Annual Fund campaign was supported by 100% of the Board, Faculty and Staff and a record 96% of the families!

FOUNDERS CIRCLE

In our 25th Anniversary year, the Annual Fund Campaign's Founders Circle was created to honor the five Founders whose vision and dedication created the Emerson Waldorf School: Suzanne & Robert Mays, Eve Olive, Barbara Shell and Olga Wierbicki. The generous support of the following individuals established the Founders Circle to inspire others to make a special gift to future Annual Fund Campaigns in honor of the Founders.

Mary Lou & Will Bethune, Janet & Georg Buehler, Paige and Jeff Chandler, Dee Anne & Wilson Lamb, Leigh & Byron Matthews, Eve & Bill Olive, Janet Sanford, Merideth Tomlinson & Mark Hulbert.

—*Fund Development Committee*

Donors to the 2009-2010 Annual Fund follow on the next page.

Annual Fund 2009-2010 Donors

Catherine Belitsky and Neil Alexis

Corey Alicks

Rita Alicks

*in honor of the Lie-Nielsen children, and
in memory of Grandpa Charlie Alicks*

Sharon Anderson

in honor of Nicholas and Aaron Schneider

Joanne Andruscavage

Anonymous (10)

Karla Boyce-Awai and Michael Awai

Nancy Balasubramanian

Bruno and Heather Baudet

Stephen Beck

Rebecca and Gregory Berenfield

Anne and Richard Berkley

Mary Lou and Will Bethune

Steve and Denise Bevington

Dan and Cherie Biggerstaff

Nicole and Ronald Bodkin

Ingeborg Boesch

Robyne and Shahin Borhanian

Sandie Bowen

Julie and Joey Boykin

Kevin O'Mahoney and Lisa Braden

Julie Brown

Georg and Janet Buehler

Hans and Marion Buehler

Joel and Taryn Burgess

Edna Butler

in honor of Hannah Butler

Kathleen and Gary Caldwell

Virginia Callaghan

Rafael O.P. and Bruna De Campos

Alice Armstrong and Rob Carter

Paige and Jeff Chandler

Rhonda Lanning and Jason Child

Susie and Sean Cohen

Viorica and Adrian Comanicu

Yanina Criolani

Joanne Dahill

Kim and Eduardo D'Angelo

Allison and Mark Davidson

Anne and Gart Davis

Selena Lauterer and Kelly Davis

Christine and Phil DeGuzman

Michelle and John Demers

Mary and David Deutsch

Shoshanna and Charles DiBetta

Phillip Butler and Gay Dingle-Butler

Cindy Doty

Dow Jones & Company

Nancy Moore and Tim Dowdall

Karen and Robert Durovich

Keegan Durovich

James Dyess

Leslie and Tim Dyess

Ms. Lois Eaker

Cassandra Edwards

Elena Dubrovsky and David Emerson

Dave Emerson

Matthias Ender

Escobar Family

Amelia and Ron Evans

Benjamin and Heidi Farrell

Joyce and Kenny Felder

Victoria Flynn

Linda Folsom

Tara and Matthew Furze

Katja Moos and Stephen Galla

Susan Axelrod and Edward Garvey

Priya and Madan Gopal

Lisa Gould

in honor of Dee Anne Lamb

Wendy Graber

Ian and Barbara Graham

Judy Grant

Laura Abad and Hector Gutierrez

Dennis Hagerman, *Faculty, retired*

Howard & Jessie Hall

in honor of Kimani, Khari and Anika Hall

Tia and Dave Hall

Kimberly and Brian Harry

Susan and Ted Hart

June Shutes and Matthew Hassinger

Maren Anderson and Hank Head

James and Carolyn Heuser

Bill and Betty Hicks

Kimberly Hicks

Erin and Jens Hoeg

Rosalind and Jens F. Hoeg

Paige and David Hollar

Barbara and Richard Holloway

Jean Hulbert

Merideth Tomlinson and Mark Hulbert

Nataliya and Serhiy Hulyayeva

Ashley and Kathleen Jackson

Venus Stafford and Prashanth Jade

Patricia Cornell and Gene Jonson

Ms. Esther Kaize

Shirin Kaye-Saeck

Robbie Roberts and Dayna Kelly

Pat McKenzie and Kathy Keyser

Mary and Bruce Kirchoff

Ruth Kirchoff

Lisa Krogh and René Krist

Kathleen Krull

Carol Kubik

Dee Anne and Wilson Lamb

Robin and Chris Lamb

Jenny Lenox

Mary Leonhardi

Cathy Linskens

Norma Lofland

in honor of Dee Anne Lamb

Anne Mandeville-Long and Robert Long

Amy and Whitney MacDonald

Carol and Ken Mahaffey

Kiera and Kanchan Manna

Helen Marchman

Sue and Lee Marchman

Laura Guinan and Val Martinez

Leigh and Byron Matthews

Suzanne and Robert Mays

Ms. Florence McCachren

Susan McCachren and Ross Raymond

Robin McCasland

Stacey McDonald

in honor of Mr. Boesch

Marilyn and Richard McGrath

Ross and Margie McKinney

Alicia and Peter McKinnis

Matina and John Metz

Kathleen and Donald Michael

Joshua Bedick and Jennifer Midkiff-Bedick

Renee and Felix Militante

Angelo Sphere and Melissa Miller

Vickie and Paul Miller

Jenae Tharaldson and Thomas Mills

Shankha and Deidre Mitra

Shyamali Mitra

Beth Shirey and Toshikazu Mizobuchi

Deborah Pearson-Moyers and Peter Moyers

Mary Beth and Jim Mueller

Catherine Neill

Jill and Jim Nelson

David Nikias

Lauren Mills and Lars Nyland

Shannon O'Connor

Eve and Bill Olive

in memory of Betsy Ann Olive

Bruce and Kathryn A. Olive

Susan Olive

in honor of Eve Olive

Robin Olson

C. Mark and Joann Ostrowski

in honor of Ian Ostrowski

Ian Ostrowski

Pantana Bob's of UNC

Kim Payne

Antonio Pesce

Gaye Weaver and Karl Pfister

Therisa and Chris Pienaar

Candor and Francisco Plaza

Nice Polido

Patti Pozella

JoAnn Qandil

Stacey Qandil

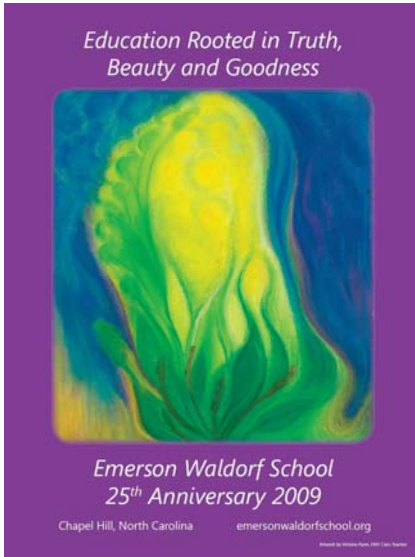
Elizabeth Ragland

Annual Fund 2009-2010 Donors, *continued*

Alyson and David Ramesh
Katie and Kevin Reily
Lisa Ripperton
Kris Ritz
Mr. and Mrs. Walter Robbins
Rebecca Rogers
Linda and Ed Rosenthal
Ashu Handa and Lisa Rubenstein
Jane Salemsen
Heather and William Sanford
Janet Sanford
Helen and Simon Sawyer
Elena Schertz
Linda Michaels and Richard Schmalbeck
Herbert and Gerda Seeland
in honor of Holloway children
Arline and Dave Senkpiel
Kimberly Haufler and Michael Senkpiel
Laura and Stephen Shmania
Herbert Slapo
Martin and Barabara Soloman
Leigh Sparacino
Lisa and Craig Stauffer
Lorraine Stephenson
Kathleen Stone-Michael
Monica Sanchez and Brian Sturm
Danielle and Matthew Tanzer
Ms. Julia Taylor
Judy Weinstock Team
Liz Alway and Doug Townsend
Narine Pavlova and Alexander Tropsha
Benjamin Trueblood
Thomas and Nancy Trueblood
Twig in Chapel Hill
Carolyn and John Ujvari
Claire Viadro and David Valleroy
Jim and Ann Valleroy
Robin and Alex Verhoeven
Charles Viles
Natasha Vinas
Yvonne and John Viteritti
Merlin Walberg

Susan and Kenneth Walsh
Emily West
Joy and Andy Whitfield
Mary Wiley
Shannon and Kelley Wiley
Jennelle and Scott Williams
Dan Moise and Carol Ann Williamson
Nancy Willson
Joanne Wood
Jamie York
Ame and Genia Zimmerman

25th Anniversary

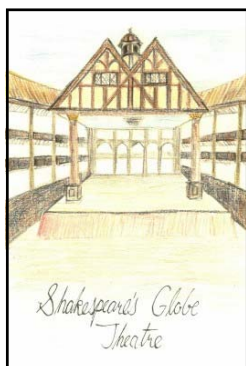


25 REASONS FOR CELEBRATING: a teacher's warm handshake, soup day, 54 acre campus, class plays, wooden spoons & copper bowls, playing instruments, singing songs in Spanish & German, excellent SAT scores, 5th grade Olympics, play stands & silk puppets, farm, 1st grade dolls, *The Odyssey* for the iPod generation, Main Lesson books, Circus Arts, Senior Projects, Lantern Walk, knitting socks & sewing pajamas, potlucks & coffee table, 3rd grade farm trip, outstanding College acceptances, 12-year curriculum, Michaelmas, 25 years of inspired learning!



The Board of Directors, the College of Teachers, and the Administration acknowledge the following people for their efforts in 2009-2010 on behalf of the school and in creating the materials included in this *Annual Report*:

- the dedicated EWS faculty and staff
- the parents who support their students and the Waldorf curriculum in their homes
- the many parent and grandparent volunteers who manifest our vision through their donation of time, energy and spirit
- the beautiful and talented students who bring alive our campus and curriculum each day



Waldorf Educational Association
of North Carolina, Inc.

Emerson Waldorf School
6211 New Jericho Road
Chapel Hill, NC 27515

Phone: 919-967-1858
E-mail: info@emersonwaldorf.org
Website: www.emersonwaldorf.org