

Waldorf Educational Association
of North Carolina



Annual Report

2008-2009

All School Meeting
November 23, 2009
7:00 pm



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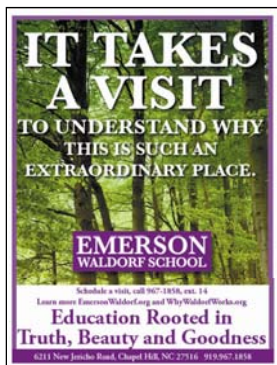
Mission Statement

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



The Board provides financial and legal oversight of the school's management as well as develops the school's financial and capital resources to support the expansion of programs and campus facilities.

In 2008-09, improving internal processes and solidifying common understandings to ensure the stability and sustainability of the school's mission and operation provided the theme to the Board's work.

Among the achievements of the year are the following:

- Hiring a CPA and retaining an audit firm to assist the Administration in establishing proper accounting procedures and preparing our financial records for an outside audit
- Integrating policies and procedures in compliance with the accreditation standards and indicators devised by the Southern Association of Independent Schools and Southern Association of Colleges and Schools
- Responding to changing economic conditions by protecting the school's investments and assets, creating contingency budgets to preserve current staff and programs with unpredicted variations in enrollment, renegotiating contracts and financial terms, following a 5-year rolling financial plan
- Mandating long range planning committee to articulate a plan for achieving growth in enrollment, financial resources, program and facility expansion, and campus development
- Improving Board operations by structuring meetings more efficiently, working through committees, developing skills specific to trustee roles, and adopting the National Association of Independent Schools best practices
- Supporting the professional development of our Administration
- Working with the College and the Administration to create and achieve goals that are common to all areas of leadership

The groundwork laid in this year strengthens the operation of the Emerson Waldorf School and ensures our mission will provide inspired learning into the next 25 years!

Leigh Matthews, President, Board of Directors

College of Teachers

The 2008-09 was a very active and fruitful year for the College of Teachers! Throughout the year, the College focused on excellence in teaching and learning, worked on program development, and strengthened its role as a leadership body within the school.

Clear Learning Expectations The faculty refined and updated the grade-level content checklists, developed curriculum description documents, and developed grade-level skill goals checklists. These documents allow teachers to develop a clear sense of student progress, and it allows the College to analyze the overall progress of classes as well as overall school effectiveness.

The College also refined the math program so there are multiple math tracks to lead from 7th through 12th grade in a coherent and integrated way. Students now have improved individualized instruction in this key skill area.

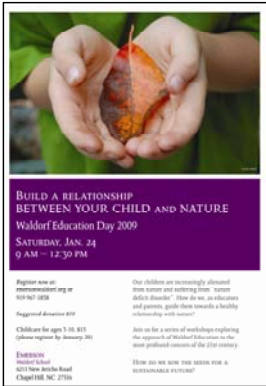
Program Development & Strategic Planning The College had three program priorities for development in 2008-09: social inclusion, remedial instruction, and Eurythmy. In addressing these priorities, the College

- Formed a social inclusion coordinating group charged with facilitating all aspects of our social inclusion program and guiding the school community through implementing the program
- Created a Director of Remedial Services to provide needed services for all of our students as well as to coordinate support services such as tutoring and study skills classes
- Continues to seek a strong, dynamic Eurythmy teacher who can envision and bring into reality an entire K-12 Eurythmy program

The high school turned seven this year and at the end of the school year 60% of its faculty resigned. The College responded by creating the High School Futures Committee, and tasked it with carefully examining the founding years of our high school and redesigning the high school programming.

College as Employer The College created a new, comprehensive Professional Development Plan which outlines clear, consequent professional development procedures. In addition to the internal evaluations that were conducted, the College employed Astrid Maclean, a master Waldorf teacher from Edinburgh, Scotland, to complete teacher evaluations of four of our teachers and employed Else Gottkins,

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a master Waldorf teacher and mentor from Holland, to mentor individual teachers. Else also presented a training on cultivating discernment in students and presented to the College models for faculty mentoring and evaluation.

The College created or revised policy documents to ensure that all teachers have a common understanding of our practices including: teacher workload expectations employee conduct, student attendance, field trips, flexible teaching scheduling, and student dress codes.

In-Service Days Two half days and one full day of concentrated time allowed the full faculty to work together to develop school improvement ideas that we could take into the year-end work week for further development.

Leadership & Governance To facilitate collaboration of the full faculty, the College governance was divided into five standing committees, each with a clear mandate to work on one aspect of our school: professional development, student development (assessment and tracking of student progress), curriculum (creating learning outcomes for each class and maintaining the integrity of our Waldorf curriculum), student life, and festivals/events.

Community Involvement In its meetings, the College hosted visits from the president of the Anthroposophical Society of North Carolina, as well as from EWS founders. We attended a dinner with the AWSNA leadership council when EWS hosted their meeting on our campus. The College also developed a proposal guide which allows community members to bring initiatives to us in a clear, organized way so that we can make quick decisions about their ideas.

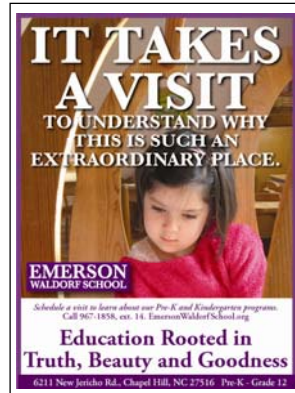
Study The College undertook serious group study in addition to our usual business throughout the year. These multi-week studies ranged from the practical to the esoteric and included *Education of the Adolescent*, an exploration of the school's history, as well as study of Rudolf Steiner's writings on sympathy and antipathy.

Thanks to the constant support and collaboration of our Board of Directors and Administrator, this was a year of growth and important strides for the College.

Jason Child, Chair, College of Teachers

Administration

The Administration serves the entire school community to ensure smooth operations and a warm, welcoming atmosphere. The staff is involved in all aspects of school operations from admissions and business to student records and facilities as well as developing good relationships in the community. The Director of Administration coordinates these functions and maintains the school's compliance with federal, state and local regulations. In addition, the Director serves as part of the leadership of the school as an ex officio member of both the Board and the College.



In 2008-09 the Administration completed many projects related to improving our outreach and admissions policies and procedures. Through collaboration with the Board and College, we hosted successful open house events and visits by local university students. We continue to improve the timing of our re-enrollment process bringing our school into line with other private schools in our area. And in a year when the economy struggled, we can look with pride on our financial aid program which allows more than 70 students to attend our school who otherwise could not.

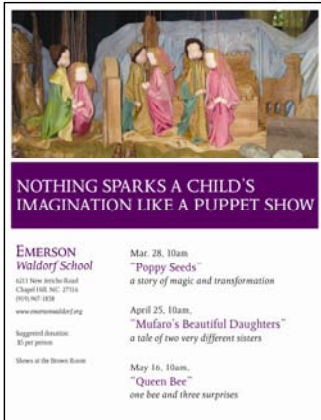
Much progress was made on campus beautification including working closely with the “Hands” group of the Parent Organization, especially Barbara Holloway and Penny Sparacino. Wednesday afternoons became a time of fun and music while weeds were pulled, mulch was spread, and flowers were planted. Many thanks to all who have taken an interest in making our lovely campus look its best.

The Administration also led a successful Annual Fund campaign and assisted with Holiday Faire and other fundraising efforts. We also drafted a fund raising policy to establish procedures for establishing events and accepting donations.

Our ongoing accreditation efforts are led by the Director of Administration, and many hours were spent in 2008-09 collecting data, creating plans, and coordinating the efforts of many teachers, staff and Board members. It is exciting to enumerate all the wonderful work done by our teachers, staff and families. We are proud of our accomplishments and look forward to opening our school to a team of educators in March 2010.

Joanne Andruscavage, Director of Administration

Parent Organization



Growth and progress have been strong factors for fundamental changes in the Parent's Organization over the year. The accreditation process has helped to move the PO from a historically fund raising body to one where the emphasis is much more concerned with community building. Community is, among other factors, a fundamental part of a healthy environment for the growth of our school.

To that end the PO has placed its effort almost exclusively in its Heads, Hearts and Hands committees, which we see as the entities that carry out the work of the PO. Hearts has focused much more on informal social events

designed to simply get parents together, exchange ideas, and have fun. Hands continues its work with campus maintenance and beautification; and Heads continues to provide parents with educational opportunities and to remind us all of the reasons we chose a Waldorf education for our children.

The goals of the PO for the coming year are to continue to connect parents into a cohesive whole so we can be a stronger force for the continued progress of our school. "More picnics" was shouted recently by a parent at a meeting when suggestions were asked for, and this will continue to be a big part of our year, as will other social activities.

"Who will do it?" is an ever-present question that must be answered if any group such as ours is to reach its goals. Our answer is "Volunteers!" So, this idea of service will again this year be promoted and encouraged. The parents themselves can be an increasingly valuable resource since, as all of us know, there are many gifted and talented parents at our school with much to offer.

Our bylaws are currently being changed to reflect the new role of the PO and will be available soon for public comment. We also are developing ideas for easier communication between and among parents.

It is an exciting time for our school and for the "organization of parents" and the leadership of the PO is grateful to be a part of it.

Will Hicks, President, Parent Organization

Treasurer's Report

From a financial point of view, the 2008-2009 fiscal year (ending June 30) was noteworthy for two reasons. The first reason is that, despite a very challenging economic environment, the Emerson Waldorf School lived within its means. The second reason: The school undertook its first full-scale financial audit in its 20+-year history.

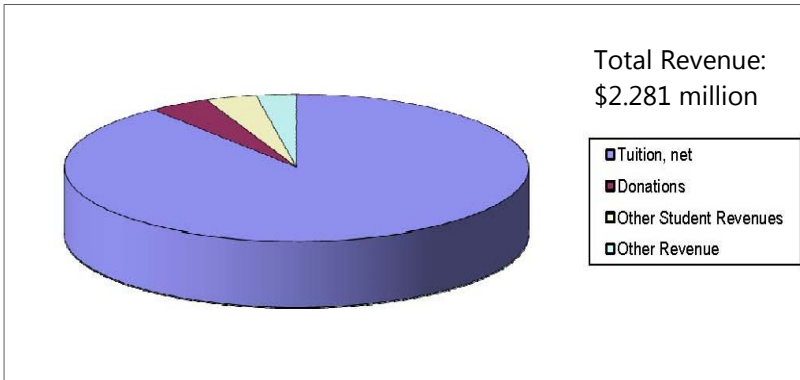
While by no means downplaying the significance of the budget discipline required for the school's finances to be in balance for the 2008-2009 school year, or the faculty and staff sacrifices that made this possible, the audit is truly a momentous event in the school's financial history. It is one of the hurdles over which we must jump to become an accredited school, for example, which in turn will make the school eligible for outside funding that was previously not available to us.

Preparing for the audit has involved a lot of hard work, for which we owe a big debt of thanks to Tara Furze (Director of Finance), Alan Lee (part-time Chief Financial Officer), and Joanne Andruscavage (Director of Administration). The audit is expected to be completed in early 2010.

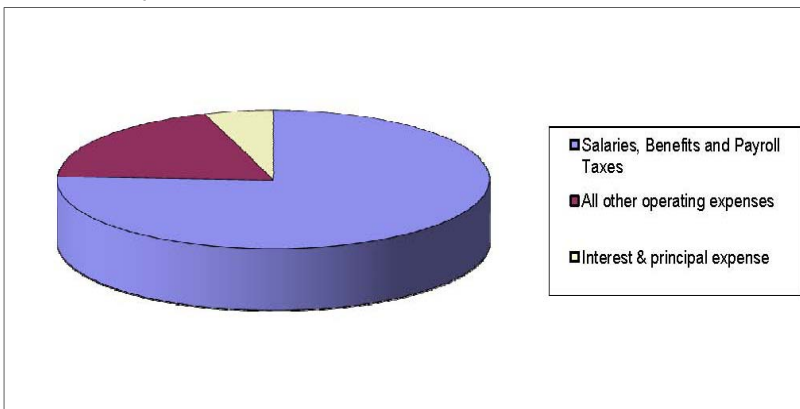
Mark Hulbert, Treasurer, Board of Directors

Charts of Total Revenue and Total Expenses

2008-09 Revenue



2008-09 Expenses



Outreach and Marketing Report

“It Takes a Visit” Targeted Advertisements

- *Carolina Parent* (February, April, June)
- *Durham Magazine* (February, April)
- *Chapel Hill Magazine* (March)
- *The Independent* (Camp Guide issue, Parenting issue, Best of Triangle issue)
- *Southern Neighbor* (April)
- *Renewal* (Spring/Summer issue)
- WUNC spots (Waldorf Education Day, Puppet Show, Kim Payne, and Holiday Faire)

Articles and Free Publicity

- *Chapel Hill Herald*: 11th grade trip to the US Presidential Inauguration
- *Southern Neighbor*: Chinese PE teacher exchange
- *Southern Neighbor* and *Chapel Hill Herald*: Puppet Show
- *Chapel Hill Herald*: Michael Howard’s lecture
- *Chapel Hill News* and *Carrboro Citizen*: Waldorf Education Day
- *Daily Tar Heel* “Best Bet”: High School art show at Open Eye Café
- *Daily Tar Heel*: Kim Payne’s lecture

Events

- Waldorf Education Day
- Michael Howard lecture
- Breakfast for independent school Administrators and Admissions Directors
- Puppet Show series
- Shakori Hills Music Festival
- Camp Fair
- Carrboro Music Festival
- Festifall on Franklin Street
- Chapel Hill Preschool Fair
- High School Fair sponsored by Duke School and Triangle Day School

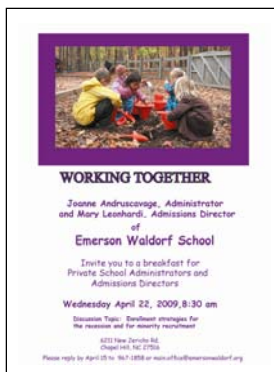
Materials and Media

- Open House DVD distributed by direct mail and on website
- Facebook page
- High School Overview materials
- Outreach web survey

Alice Armstrong, Director of Outreach



Development Report



Annual Fund & Other Fundraising

In 2008-09, our development income totaled nearly \$80,000. This figure includes Annual Giving plus \$11,000 profit from the Holiday Faire and \$10,000 in Scrip sales. Community participation in the Annual Fund campaign was nearly 60%.

Grants

A spreadsheet of viable grants for EWS was created and includes a basic description of the grant, contact information and deadlines. Attracting grant money to support our music and practical arts programs, social inclusion work, and to expand our library holdings will be the first priority.

CRM Database

Georg Buehler began integration of development data into the CRM database system. Three years of donation history has been re-entered with plans to migrate the data from previous years. The CRM system will allow more reliable tracking of donations and also assist with development efforts including letter/label generation.

25th Anniversary Planning

Initial planning for the 25th Anniversary celebration began in 2008-09 with scheduling several events. Details of the events will be managed by the 25th Anniversary Planning Committee in 2009-10. Among the events planned are a kick-off potluck, hosted by the Parent Organization, AWSNA Golf Tournament: "Winning with Waldorf V" to be held the last week of school in conjunction with a "gala" event and an alumni event.


Alumni

The 25th Anniversary is the perfect time to begin an active alumni program! Over the summer, contact information for our alumni was collected and organized so that we can correspond with our former students and assist them with finding each other.

Justine Way, Director of Development

The Board of Directors, the College of Teachers, and the Administration acknowledge the following people for their efforts in 2008-2009 on behalf of the school and in creating the materials included in this *Annual Report*:

- the many generous donors to our 2008-09 Annual Fund campaign
- 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
- Jerry Stifelman, of *The Change*, for the design of our logo and the development of our integrated marketing plan
- the beautiful and talented students who bring alive our campus and curriculum each day



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of North Carolina

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