

Annual Report 2016-2017 School Year



Tucson Waldorf School

Engagement in Education, Joy in Learning



Mission

Tucson Waldorf School is a community dedicated to joy in learning. We believe in engaging each child through meaningful experiences, attuned to the unique stages of childhood.

Vision

Tucson Waldorf School graduates approach life with purpose, intention, and commitment to social responsibility, confident of their place in the world.



“The need for imagination, a sense of truth, and a feeling of responsibility—these three forces are the very nerve of education.” - Rudolf Steiner

Message from Administrative Leadership

MARGERY BATES, LINDA BRAUN, & REBECCA BRIAMONTE

Walk onto the campus of Tucson Waldorf School (TWS), and you'll feel that the school is a living being, complete with a heart and soul. Spend enough time here, and you'll feel all the ways in which your family is a part of this, and it, a part of you. You may recall a teacher referring to an “in breath,” the quiet focused activity of listening to a story, drawing in a main lesson book, or observing nature. You may also delight in recognizing the children engaging in “out breath” activities, such as creative play, riding unicycles, or playing a lively game of Four Square under the big mesquite tree. Just as your family develops its own character and personality, so too does each class. Just as your living family is growing and maturing, so too is our school.

During the past year, TWS attained several significant milestones characterized by growth and maturity as a now 24-year-old entity. Many of the achievements of 2016-2017 were driven by the question, “What constitutes a healthy organization?” The answer reflects a need for differentiation and specialization, as well as unity.

Leadership had the pleasure of seeing many of our Strategic Plan goals come to life in 2016-2017. This was our first year as an accredited full member of the Association of Waldorf Schools of North America (AWSNA). The maturing of our faculty was highlighted by the Michaelmas Ceremony, which marked the transition of the Core Faculty into the College of Teachers. The differentiation of roles and responsibilities necessary for our school's healthy function was seen at every level of our organization.

Early Childhood faculty devoted study to the nursery curriculum and how working with the younger children differs from working with kindergarten children. The Grades faculty reimaged the foreign language offerings, creating the World Languages Program to more fully and richly meet the needs of our students, with a deepening of Spanish work in the middle school years and an introduction to Arabic in grades 1-5. The College of Teachers refined our faculty evaluation process to provide consistency into the future. The financial, pedagogical, and administrative bodies defined priorities with renewed clarity and purpose including land stewardship, committee work, festivals, administrative needs, development goals, and our role as an employer of over 40 people.

2016-2017 offered another first to Tucson Waldorf School, when we stepped up in our role as full members of AWSNA, with Class Teacher Irene Richardson and Pedagogical Director Linda Braun representing our school at the Delegates Meetings around the continent. Through our delegates, with our foundation of maturity and success, TWS now acts as a mentor and role model for younger developing schools in our TexMexCanSoRock region. We are honored to be part of carrying forth the larger mission of Waldorf education in the world-wide community.



ADMINISTRATION

Margery Bates *Administrative Director*
Linda Braun *Pedagogical Director*
Rebecca Briamonte *Enrollment Director*
Wynter Pradier *Operations Manager*
Melissa Campbell *Development Associate*
Jennifer Sorensen *North Office Coordinator*
Tessa Swanson *South Office Coordinator*
Aaron Suski *Facilities Manager*

LEADERSHIP COUNCIL

Margery Bates *Administrative Director*
Linda Braun *Pedagogical Director*
Irene Richardson *Grades Pedagogical Chair*
Kim Lewis *Early Childhood (EC) Pedagogical Chair*

EARLY CHILDHOOD FACULTY

Andrea Fiser *Marigold Garden Teacher*
Leila Lopez *Marigold Garden Assistant*
Kim Lewis *Sunflower Garden Teacher*
Cyd Lannigan *Sunflower Garden Assistant*
Kimberli Eddins *Red Rose Garden Teacher*
Bettina Fuchs *Red Rose Garden Assistant*
Maggie Queathem *Star Garden Teacher*
Ron Spector *Star Garden Assistant*
Nicole Williams *Rosemary Garden Teacher*
Carmenza Fernandez *Rosemary Garden Assistant*
Rebecca Davis *EC Before Care*
Zoe Hackl *EC Extended Day Assistant*
Chelsea Cruz *EC Extended Day Assistant*
Charlene Campbell *EC Extended Day Assistant*
Ursula Ramos *Quail's Nest (Parent/Child Teacher)*

GRADES FACULTY

Michelle Blazewicz *Grade 1*
Christabelle Merrill *Grade 1 Assistant*
John Keeney *Grade 2*
Cynthia Hovland *Grade 3*
Bayla Sussman *Grade 4*
Irene Richardson *Grade 5*
Lisa Archer *Grade 6*
Judy Taylor *Grade 7*
David Sussman *Grade 8*
Sophie Richerd *Grades 1-3 Extended Day*
Ian Johnson *Grades 1-3 Extended Day*
Christabelle Merrill *Grades 1-2 Before Care*
Melissa Rivenbark *Grades 3-8 Before Care*
William Coinman *Grades 4-8 Extended Day*

GRADES SUBJECT FACULTY

Em Bowen *Spanish Teacher*
Lisa Barnes *Handwork Teacher*
Olivia Hansen *Handwork Assistant*
Jose “Leo” Moore *Music/Strings Teacher*
Heidi Johnson *Movement Education Teacher*
Em Bowen *Middle School Support*
Thomas Conner *Woodworking Teacher*
Charles Swanson *Gardening Teacher*
Mark Ebersole *Eurythmist*

Message from Board Treasurer, Eric Lamb

The 2016-2017 school year began with the board approving the 2016-2021 Strategic Plan. Given the direction of this plan, the Finance Committee was able to create a 2017-2018 budget that included improved compensation equity across positions and job descriptions, funds for a remedial instructor, a market-based salary for the Administrative Director, a revised employee tuition remission policy, and a revised health benefit policy that lowered premiums. Additionally, a more sustainable and predictive model of tuition assistance was developed that paid a large dividend during the second half of the school year. My thanks and congratulations to Margery Bates and her staff, as well as the board and committee members who put in a lot of work to make this all happen. The summarized bookkeeper prepared statements for Fiscal Year-End (FYE) 2017 (7/1/16-6/30/17) are:

The Revenue and Expense Statement shows Total Revenue of \$1,930,846 for FYE 2017. That is an increase of approximately 3.5% over the previous year, with a healthy increase coming from expanded enrollment that was unfortunately offset by a lower amount of donations received. As has been the norm for the past few years, the faculty and staff continued to make prudent decisions (sacrifices) that kept annual expenses in-line with the budget. Therefore, net assets increased by \$64,197 for FYE 2017. The ability to continue to grow revenue while keeping expenses in check is essential for the continued financial success of the school. However, the school is in need of finding ways to increase revenue from sources outside of tuition and fees to make the cash flow more sustainable over the long-term.

The Balance Sheet indicates Total Net Assets of \$3,699,450 at FYE 2017 on Total Assets of \$5,758,058 and Total Liabilities of \$2,058,608. Cash on hand ended the year at \$505,311 and is considered sufficient to cover short-term liabilities. Long term liabilities are limited to a \$517,552 mortgage loan, which is low leverage based on the school's total fixed assets of \$3,954,271. Total Net Assets changed very little from the previous year. However, the school received funds from the payoff from a mortgage receivable from the sale of the Presidio Campus, which increased our cash position substantially. Additionally, the school paid off a note to AWSF from previous years in the amount of \$70,000. Overall, the School's financial position is considered stable at FYE 2017.

As we move into the 2017-2018 Fiscal Year, we are focusing on: finding non-speculative investments to increase the return on the cash assets we have; increasing revenues from sources outside of tuition and fees; having a strong Development Committee in place to help make that happen (we need volunteers to join that committee); utilizing funds towards landscape and facilities maintenance for the long-term health of our physical space; and determining the financial feasibility of the next phase of buildings envisioned in the five-year Strategic Plan.

As always, the board is actively recruiting more parents and community members to join the various committees to help us reach our goals. If you have a background or interest in any of the items listed above, or know someone who has, please contact treasurer@tucsonwaldorf.org. A few hours each month will go a long way in transforming Tucson Waldorf School as envisioned in our Strategic Plan.

Finally, I'd like to thank the faculty, staff, board, and committee members in their continued success as stewards of this community. There has been a tremendous amount of sacrifice, hard work, and love expended on the leadership and management of Tucson Waldorf School. I am proud to be a member of this community and to witness all the wonderful things being accomplished for the benefit of our children. I wish you all a happy and healthy 2017-2018 school year.

Financial Statement

Revenue and Expenses



Statement of Financial Position

| | |
|--|--|
| ASSETS (TOTAL: \$5,758,058) | LIABILITIES & EQUITY (TOTAL: \$5,758,058) |
| Cash - Unrestricted: \$390,673 | Accounts Payable: \$42,223 |
| Cash - Temporarily Restricted: \$114,638 | School Improvements/Class Accounts: \$43,610 |
| Accounts/Pledges Receivable: \$1,190,766 | Unearned Tuition and Fees: \$1,424,148 |
| Net Fixed Assets: \$3,954,271 | Other Current Liabilities: \$30,403 |
| Other Assets - Unrestricted: \$32,353 | Long-term Liabilities: \$518,224 |
| Other Assets - Restricted: \$75,357 | Net Equity: \$3,699,450 |

BOARD OF TRUSTEES

Olga Ryan

President

Jeff Yockey

Vice President

Eric Lamb

Treasurer

Linda Biederman

Secretary

John Keeney

Grades Faculty Representative

Nicole Williams

Early Childhood Faculty Chair

Linda Biederman

Parent Council Representative

Olivia Hansen

Alumni Representative

Kira Dixon-Weinstein

Development Chair

Margery Bates

Ex Officio

MESSAGE FROM THE BOARD PRESIDENT, OLGA RYAN

I am thrilled to announce that we have ended 2016-2017 in a very strong and stable position, making the end of my tenure on the board a transition of peace and confidence! We are one year into our five-year strategic plan, and have accomplished many goals already. The College of Teachers has been formally established. A more formal evaluation program for faculty has been put in place. Several well qualified volunteers have stepped forward for board service, giving our governance a broader insight and energy. We are building on the school's engagement with alumni thanks to board member Olivia Hansen's leadership. Our board committees are strong, working groups of dedicated employees and parents who work on the details and plans of many projects and improvements.

The fruits of this work are visible around the campus. Thanks to extra donations from families during the summer 2016 mini-capital campaign, the south parking lot walkway is both safer and prettier. The woodworking class space is innovative and sensible.

The spring soiree *fresh!* was especially successful (I had so much fun in the kitchen with Andy & CJ and intend to join that crew again). The Arizona Waldorf Scholarship Foundation has once more supported Tucson Waldorf School with enough tax credit money to support 85 scholarships totaling \$132,349. The Endowment grows bit by bit, and our Finance and Development Committees have started the seed work toward creating the next building phase for our master site plan, which is the primary goal of the board in the upcoming 12 to 24 months. Enrollment numbers have exceeded our budget over the past two years, and our classrooms are straining at the seams! Due to this, we are in the very early planning stages of the next classroom spaces.

I'd like to express gratitude to Margery Bates for her continued excellent stewardship of operations, to the College of Teachers for enriching our programming, to our committee chairs and volunteers for their commitment, and to the new board members stepping up for the 2017-2018 school year. Our school has superb leadership.



Message from Development Chair, Kira Dixon-Weinstein

TWS had a wonderfully strong 2016-2017 development year, beginning with a successful Mini-Capital Campaign, continuing with a healthy Waldorf Fund campaign, and ending our fundraising season with the best *fresh!* event yet! In addition, our families benefitted from more scholarships funds than ever before, available through the Arizona Waldorf Scholarship Foundation (AWSF). With the all-encompassing Menu of Giving, TWS now offers, donors have the opportunity to partner in our mission through a number of charitable giving choices. As is always the case for an independent, non-profit school, Tucson Waldorf School relies on this charitable giving and fundraising to bridge the gap between income raised from tuition and the true cost of running our school.

Our school community successfully raised \$61,000 for The Waldorf Fund and our summer Mini-Capital Campaign. We raised \$30,000 of our \$60,000 Waldorf Fund goal and an additional \$31,000 for capital improvements to the front of the school. These improvements added to the beauty and safety of our campus. Collectively, we saw families giving generously to our school.

We had a banner year for the 4th annual *fresh!* Fundraiser raising \$21,343, significantly surpassing our goal of \$16,000! This adult-only event honors the TWS community and gives parents, faculty, staff, board, and friends a chance to come together and celebrate our beautiful school. *fresh!* has become a beloved way to support the collective work that is needed to meet our fundraising goals.

The 2016-2017 school-year was pivotal in planning for the future growth of our school. A robust Campus Planning Committee evaluated the current master plan for the school and needs for future expansion. By the end of the school year, the Steering Committee for Future Growth determined that the school will need additional grades classrooms to serve our growing school enrollment, in addition to planning a gathering space and Early Childhood improvements.

More than ever before, parents in our community felt educated and empowered to take advantage of the Arizona Private School Tax Credit Program through AWSF to aid in funding their tuition. We had an incredible increase of over \$100,000 in Recommended Scholarship contributions, creating security and sustained enrollment for our families. In addition, the AWSF General Scholarship Fund increased by over \$20,000 allowing for more families to receive needs-based scholarships. Thank you to AWSF for partnering with TWS in support of our families!



Supports tuition scholarships.



Supports programs not fully covered by tuition.



Supports school longevity and stability.



Supports campus improvement.



Report on the Tws Endowment Fund

TWS's Board of Trustees established an endowment fund in the fall of 2015 in order to create a growth investment that benefits our school long into the future. The fund is managed by the Community Foundation of Southern Arizona. TWS deposits funds each month into both a Reserve Account and into the Endowment Fund. At the end of the year, the Reserve Account was \$50,010 and the Endowment Fund was \$47,104. The Endowment Fund rounds out the TWS Menu of Giving and provides donors the opportunity to invest in our long-term growth.

“Love starts when we push aside our ego and make room for someone else.”
- Rudolf Steiner

Waldorf Fund Donors

With loving gratitude to our many contributors, whose time, talent, and treasures support our beautiful school.

Sally and John Adkins
Shelly Adrian and Erich Saphir
Amazon
Grant and Ines Anderson
Lisa Archer
Robert and Joyce Archer
Arizona State Radiology, P.C.
Lisa Barnes
Paul and Margery Bates
Vann and Kristin Betzel
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Robert and Michelle Blazewicz
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Elizabeth Dumdey-Bartelsen
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Wendy and Scott Miller
Mindful Birth Tucson
Jennifer O'Brien and George Gehrels
Pamela and Richard Park
Tyler Pickrell and Kelly Yablonski
Arthur Pittis
Wynter Pradier
Kristi and Landon Prisbrey

Maggie Queathem
Ursula and Ray Ramos
Oliver Ray
Stuart and Robin Ray
Raytheon
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RSF Social Finance - Waldorf Collaborative
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The T. Rowe Price Program for Charitable Giving
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April and Michael Wiley
Nicole Williams
Dan and Michelle Williams
Jed and Stephanie Wortman
Jeff Yockey and Laura Mielcarek
John and Sharon Yockey
Christoph and Lynda Zimmermann
Ulrike and Klaus Zimmermann

“When we give cheerfully and accept gratefully, everyone is blessed.” —Maya Angelou

PARTICIPATION RATES: 100% BOARD • 100% ADMIN • 100% COLLEGE OF TEACHERS • 83% FACULTY • 44% FAMILIES

Message from Parent Council Chair, Linda Biederman

On a recent fall morning, I was taking in the view of the Santa Catalina Mountains while listening to the Grades students sing at the monthly assembly. A parent leaned over and whispered to me, "Music is so wonderful, isn't it?" I nodded in agreement. Is there a better way to start the day than singing with friends?

Then I remembered at TWS, each class begins the day with a song or a verse. Oh, how this simple ritual accomplishes so much! It helps the children move from the bustle of arriving at school to being focused in the classroom. It activates the lungs, the mind, and the heart. It brings the group together as a community—ready to meet the day's tasks with unified purpose and enthusiasm. Yes, human beings are going to disagree sometimes or irritate one another (either on purpose or by accident), but coming together like this at the start of the school day sets the intention of unity. It's also just plain fun!

As chair of the TWS Parent Council for the past four years, I have let the classroom experience inspire me quite a bit. For example, with the help of Pedagogical Director, Linda Braun, we open every meeting with a song for the season. Singing together seems to put us in the right frame of being for working together -- focused, unified, and joyful!

Community is the foundation for the work of the Parent Council. At our monthly meetings, we have three main goals: to build and celebrate community, to work together to support the school, and to further our understanding of Waldorf education and human development.

Every year, new and returning parents and guardians bring unique gifts to TWS. Some are skilled in leadership roles as committee chairs or members of the Board of Trustees. Others pour love into handmade toys for sale at our school store. Our playgrounds and landscaping are regularly tended by parents who love dirt and the outdoors. The amazing team of Room Parents provides support for both teachers and parents in myriad ways. The list of ways in which parents contribute goes on!

Given that TWS was founded 24 years ago by a dedicated group of people, including many parents, it's no surprise that our school continues, to this day, to draw strength and inspiration from our parent body. Working together for the good of the school is enormously rewarding for so many parents. This verse by Rudolf Steiner captures this idea beautifully: "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."



ROOM PARENTS

Amelia Jones *Marigold Garden*
Sarah Salazar *Marigold Garden*
Amira Van Winkle *Rosemary Garden*
Jessica McClure *Rosemary Garden*
Lauren Gray *Star Garden*
Mireille Nashimoto *Grade 1*
Shefali Milczarek-Desai *Grade 2*
Kelly Yablonski *Grade 2*
Norma Fregoso *Grade 3*
Jen Sorensen *Grade 3*
Renee Mack *Grade 4*
Susan McGovern *Grade 5*
Becky Grimm *Grade 5*
Laurel Lacher *Grade 6*
Anne Ranek *Grade 6*
Andraya Denogean *Grade 7*
Stella Kahn *Grade 8*
Leza Carter *Grade 8*

THE ROLE OF THE TWS PARENT COUNCIL IS TO:

- provide a place for connection and support among parents
- support the school through service work
- learn about Waldorf education



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