

# SAN FRANCISCO WALDORF SCHOOL

## Town Hall: State of the School from Caleb Buckley, Administrative Director

Last year I introduced myself as the new Administrative Director at the Town Hall in February with a start date of July 1st. Since then, many of the goals we set out have moved forward in significant ways. Strong fundraising, enrollment, and fiscal decision-making continue to allow a full expression of Rudolf Steiner's vision for education put into practice. In every area of the school we are striving to realize this vision.

In 2015, the state of San Francisco Waldorf School is particularly strong at our points of entry. We have four applications for each opening in the nursery. We have received over 106 applications for our freshman class of 2019, the largest number in the school's history. Our projected K-8 enrollment of 291 for fall 2015 is the highest in the school's history. In a fiscal sense, strong enrollment also provides the means to pay our teachers and staff enough to stay in San Francisco and serve the children in their care. Although we are sad to see our enrollment directors leave for other leadership positions, we have used the opportunity to create a more efficient enrollment process as a full team serving the whole school from parent-child to high school.

While the new governance model is still young, we are off of our training wheels and working cooperatively to balance the needs across the whole organization. The Administrative Council, which combines the leadership of college, faculty, high school, grade school, and administration has been leading the accreditation self-study. Every teacher was asked to examine the strengths and weaknesses of their program areas and build a shared picture with the College of Teachers on where programs should focus for the future. Our self-study team met with the students, teachers, Board members, parents, the Multicultural Council, and administrative teams to set priorities that combine the wisdom of our strategic plan with real action on a six-year timeline. The Town Hall of 2015 represents the community's first complete look at the self study document before it is edited and released to the accreditation team for their April visit.

The largest milestone of the year was our 35th Anniversary celebration in Golden Gate Park. It is so important to celebrate the accomplishments of the school and the role individuals play in serving the community. No one has done more to create and sustain the school than founding teacher Monique Grund whose retirement was a milestone in the school's history. We are grateful that Monique will continue to be a resource for our Early Childhood Program. In February we also celebrated the completion of the new nursery, "Elves Corner." Neighbors, parents, and teachers came out to see the extraordinary space, marking the completion of a significant remodel.

On the fundraising side, the endowment campaign, after months of planning and preparation, is moving out into the community with the leadership of the Board and the Advancement Office. In the budget process, we have postponed adding new positions and taken steps towards a new compensation plan that increases salaries by a significant percentage to attract and retain the best faculty and staff in the Waldorf movement. After completing the redesign of our playground and kitchen at the grade school, the school is exploring ways it can better meet the needs of the students and teachers by providing more work areas and breakout classes.

There are also needs throughout the school that seem very real in the short term. The facility at the grade school needs to be rebuilt and modernized. Our high school phase two project build out would provide much needed performance and athletic space as well as accommodate growing enrollment. As we grow, improving programs and expanding facilities will create a need for additional teachers and professional staff who can effectively manage the school. Most importantly, we need to grow our level of service to the students and hold their social development as our guiding principle.

For the 2015 Town Hall we recognize San Francisco Waldorf School to be a place of inspiration and excellence, where the whole community is engaged in support of our children.

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## Planning for the Future – Endowment Campaign 2013-2016

### Brief History and Growth of San Francisco Waldorf School

In the late 1970s a group of people deeply interested in the work of Rudolf Steiner began working toward the establishment of a Waldorf school in San Francisco. Supported by their work, parents led by Henry and Vergilia Dakin came together with teacher Monique Grund to open the doors of San Francisco Waldorf School on September 9, 1979. Thirty-five years later, their efforts continue to bear fruit, as San Francisco Waldorf School has become the largest Waldorf school in North America.

During the first ten years, each family contributed a unique blend of talent and time to help the school function. The Dakins were the earliest financial benefactors of San Francisco Waldorf School. Early on, they anticipated the need for expansion and purchased two properties adjacent to the school. In 1988, following construction and renovation, these properties became the upper grades classrooms, the eurythmy room, and the Main Hall, now renamed Dakin Hall in their honor.

In the founding documents, the school is described as an endeavor to provide Waldorf education to San Francisco children from kindergarten through high school. After five years of planning, the school found a temporary home at Fort Mason and welcomed its first high school class in 1997. Within four years the high school had grown to 80 students and relocated to Annunciation Cathedral on Valencia Street, where it thrived for six years.

This growth, along with the beginning of an expanded early childhood program in 2001-2002 (nursery and parenting), compelled the quest for a unified campus. After several fruitless years of exploration, the decision was made that a unified campus was not possible in San Francisco, so the search was narrowed to find a location for the high school. This culminated in the purchase of 470 West Portal in 2006. One year later, the first LEED Gold-certified school in Northern California opened its doors to over 120 students.

Today, many of the founders are still associated with the school, as seasoned teachers and mentors to the next generation of faculty. From a founding class of 24 students, SFWS has grown to include over 450 students, three campus locations, and more than 130 faculty/staff to provide Waldorf education in San Francisco. Now is the time for another period of growth—this time with a focus on long-term sustainability by building a significant endowment to support the school.

#### The Case for Endowment

Endowments are permanent funds in which the principal is held in perpetuity and a portion of the investment income is expended annually (normally 3-5%). Endowment gifts provide long-term sources of

funding, supporting activities not just for one year, or one generation, but forever. They are invested prudently to ensure sustainability for current and future needs. Endowments effectively strengthen the organization's balance sheet and represent a source of permanent savings and ongoing revenue. A larger endowment for SFWS would ensure that Waldorf education survives and thrives in San Francisco far into the future. This strong financial foundation will serve to match the strong moral and pedagogical foundation that is at the core of the school today.

As a secondary benefit, by strengthening our balance sheet, SFWS will be freed to refinance the current debt and reduce bond payments moving forward, perhaps by as much as \$250,000. This debt restructuring would also enhance our ability to secure capital loans for projects in the near future, such as an effort to rebuild the eastern portion of the grade school and building a new gymnasium and classroom space at the high school to meet growing demand. Overall, the community will see a psychological benefit from knowing that there is a secure source of funds regardless of fluctuations in fundraising success and enrollment.

#### Current Endowment

Our endowment was started by forward thinking board members in 2007 who made an annual deposit of \$50,000 into a "board designated" endowment. Over the past two years, we have been fortunate to receive gifts and pledges totaling over \$730,000, which with interest brings our current endowment to over \$1.5 million. The current campaign has a goal of \$3 million, the sum established by the SFWS Board of Trustees as the point at which payouts from endowed funds can begin.

The endowment is held with First Republic Securities and is managed by our Investment Committee consisting of six financial professionals who report to the Board. Objectives and expectations are governed by the SFWS Investment Policy Statement, which follows the Uniform Prudent Management of Institutional Funds Act (UPMIFA). The portfolio is well diversified and invested in 60 percent equity and 40 percent fixed income assets. The fund's performance was 15.75 percent in the year ending June 30, 2014.

In addition to the general endowment, whose funds are not restricted, there are currently three additional endowed funds with restricted purposes. Unrestricted funds provide for the most flexibility, as income distributions are directed by the Board to the areas of most need. Restricted funds, while in their very nature are more limited, are established through conversations with the donor and the school to provide restricted funding for targeted areas in perpetuity, according to the donor's wish.

#### Monique Grund Endowed Faculty Fund



In 2013, the Monique Faculty Fund was established by an anonymous donor to support SFWS faculty and to recognize our beloved founder Monique Grund.

This endowed fund will provide increased funding in perpetuity for salaries of faculty who provide such a wonderful education to our children.



#### Outdoor Classroom Fund

In 2013, the Outdoor Classroom Fund was established to support the idea that students should experience the outdoors on a daily basis. This Fund supports the nature education program from Nursery through Grade 12, and is a vital component of our students' academic lives.



#### Multicultural and Diversity Fund

This fund, established in 2014, promotes understanding, awareness, and celebration of the diversity, both cultural and otherwise, in our school community and our community at large.

## Report from the Business Office

We are more than six months into our current fiscal year (2014-15) and the school's revenues and expenses are progressing in line with our budget.

Several infrastructure improvements have been completed, including a major overhaul of our information systems that involves multiple new servers at all campuses and a backup and recovery system for all school data; and renovation of the Elves Corner nursery, complete with a soundproofing system.

The school has started to envision the fiscal year ahead: plans and budget requests for 2015-16 have been developed and upcoming personnel changes provide the school with opportunities to reorganize program offerings and operations. For instance, we are consolidating and streamlining the enrollment department across campuses.

Alongside the tuition assistance applications for re-enrolling students there are a record number of new student applications. Our early childhood program (parenting, nursery, kindergarten) continues to be in high demand and we have a waitlist for many families. In the high school we experienced a record number of inquiries and applications for the next freshman class. We are looking forward to a successful year.

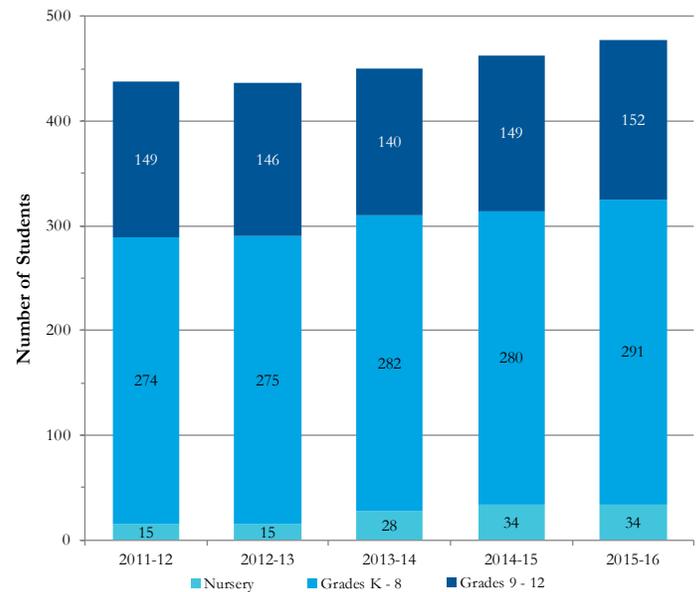
The Board of Trustees voted on the tuition schedule for 2015-16 and families should have received the letter from Board President Sheila Schroeder. Re-enrollment contracts were mailed out on February 6 and were due February 20.

The Board also decided on an important change for the school's endowment. In the past, 60 percent of funds were held as a "Board Designated Endowment (BDE)," meaning that funds could be distributed at the Board's discretion. It was decided to turn this fund

into a true endowment fund in perpetuity, meaning that only the interest and dividend can be distributed, never the principal. All our endowment funds are now permanently restricted. This speaks for the strong financial position of the school and ensures our long-term sustainability.

As endowment funds continue their growth, the school is looking into an outside endowment manager to further professionalize fund management and safeguard the school's investments.

### Actual and Projected student enrollment 2012 – 2016:



### Staff Profile: Gerhard Engels, Director of Finance and Strategic Planning

For more than two decades, Gerhard Engels provided financial and business management consulting services to cutting-edge companies worldwide. His expertise guided businesses of all shapes and sizes, from start-ups to Fortune 500s, with particular emphasis on the intersection between business and technology.

Gerhard grew up near Düsseldorf, Germany and received his master's degree in mathematics

from University Bonn. (His thesis topic: mathematical logic.)

Throughout his youth and into his professional career, Gerhard also pursued a spiritual path that centered on the practice of mindfulness and meditation. Between business engagements he created time for contemplation and pursued teachings, at home and abroad, at spiritual communities, monasteries, and ashrams.

In the early '90s his practice brought him to the United States and Esalen Institute in Big Sur, where he met his wife Margo. They settled in San Francisco and are raising two boys, Jeremy (grade 10) and Griffin (grade 4), grateful to have Waldorf education for their children.

Now directing finance and strategic planning at San Francisco Waldorf School, Gerhard sees his current professional role as the result of an intentional merging of personal values and professional expertise in service to community.

"I made a values choice in coming to San Francisco Waldorf School," Gerhard reflects. "I was at a point in my life and career where I wanted to better integrate my professional and spiritual paths, and was consciously exploring the nonprofit sector. I had experience on

educational boards, and this was the opportunity I was looking for."

Gerhard and his team in the business office – Jim Finn, Lisa Lehto, and Kenia Echeverria – have helped to take the school to the next level of financial professionalism and growth: establishing best practices; introducing financial reporting and projection models; solidified agreements for budgeting procedures and responsibilities; and managing the creation of the school's *2020 Strategic Plan*, a blueprint for growth over a decade.

Gerhard also works closely with the Board of Trustees to realize the vision of a fiscally sustainable and thriving organization, including continued growth of an endowment that has reached impressive new levels over the last five years. One longtime Board member compared the business office to a "well-oiled engine." Gerhard describes his fiscal perspective as "conservative and solid."

Gerhard begins his day in meditation and spends two weeks each year at silent retreats. He describes himself as an introvert and, in his unfailingly polite manner, says that he hopes people do not take it personally if he does not stop to talk. Yet he has also helped to create a community conversation around what can be a touchy subject – money – by helping to institutionalize annual Town Hall and financial Town Hall meetings.

Notes Gerhard, "For me, there is no contradiction between the spiritual word and the material world. We are stewards of the school's mission, whether that means teaching or parenting or creating a solid financial foundation from which to operate. I am entrusted to manage resources for the good of the community and in service to the students – and that gives me great fulfillment."

## Upcoming Public Events

- Tuesday, February 24, 7-9pm **Town Hall** high school campus  
Thursday, March 12 - Saturday March 14 **HS Musical: A Funny Thing Happened on the Way to the Forum** brava theater  
Friday, March 20, 4-11pm **Moms Night at the Elks** san francisco elks club  
Friday, March 27, 9:30am - 12:30 pm **GS Grandparents and Special Friends Day** grade school campus  
Monday, March 30, 9:00am - 12:20 pm **HS Grandparents and Special Friends Day** high school campus  
Saturday, May 9, 6-11pm **Spring Night** general's residence

Visit our online calendars and news pages at [www.sfwaldorf.org](http://www.sfwaldorf.org).

## Alumni Corner



### An Interview with Alyssa Woodman (SFWHS Class of 2006) *Working on the Cutting Edge of Sustainable Transportation*

#### Tell us a bit about your life.

I have been working at Tesla Motors since October 2013 and was recently promoted to Senior Project Manager. While this occupies most of my life, I carve out time for other adventures: Belize last November, Thailand this April, weekend ski trips with friends. I volunteer at a homeless housing project, providing homework and tutoring support. Also, I enjoy seeing Waldorf classmates, both

from grade school (WSP) and high school (SFWHS). And I am putting my Waldorf art skills to use illustrating my cousin's book of poetry, due to be published this March in Germany.

#### Describe your journey since high school graduation.

I was accepted to Drexel University but took a "gap year" after high school for travel and work. I moved to Lake Tahoe and worked at Heavenly ski resort for the winter season, enjoying the freedom of a minimum wage job with minimal responsibilities. I later traveled to Australia and Germany over the summer.

While I enjoyed my year off and would recommend it to high school graduates, I was also ready to get back to school. At Drexel I studied Design and Merchandising, with a minor in Marketing, and valued the program and Philadelphia. After graduation, California called me home: I became an intern at CloudOn, a small start-up in Palo Alto, and within a few months was offered a full-time position as a Product Manager. I learned a lot in the start-up world and am grateful to have worked with such talented people. I stayed with CloudOn for two years, but found that I needed to work for a company that I truly felt passionate about, the way most people at CloudOn felt about their product.

After two years, I jumped at the opportunity to work for Tesla. The company is working to accelerate sustainability in transportation and bring electric cars to the mass market, something I am passionate about. Still, I knew little about cars, even less about electric cars, and even less about the team I joined (wire harness engineering) — so there was a steep learning curve. The company has a sink-or-swim culture and encourages employees to take initiative. I learned quickly how to contribute to the team, support them in a variety of capacities, and was recently promoted to my current position.

#### Can you reflect of your Waldorf years, nine years after graduation?

Waldorf's emphasis on creativity in learning and curiosity of spirit is alive for me in the workplace and in my life. Tesla is still very much the scrappy, start-up kind of place, and each individual is given great responsibility over their tasks. If you don't do it, no one else will. The small classroom environment at SFWHS fostered that same sense of responsibility and initiative. The teachers knew our strengths and

encouraged us to work on our weaknesses — they challenged us to do our best. I was inspired by the caliber of my fellow students, and was constantly motivated to think and work in new and innovative ways. The Waldorf emphasis on independent initiative has served me well, at work and in personal development.

#### You joined SFWS in the high school. How was the transition?

I attended the Waldorf School of the Peninsula for grade school, so although I was new to SF Waldorf, the transition was quite natural. First though, I spent my freshman year at a German international school, but missed Waldorf education so much that I knew I had to commit to the trek to the City. The creativity, energy, rigor, and passion for learning at the high school were well worth the three-hour daily commute. I felt welcomed and at home at the high school and grew academically and personally during my time there.

One thing I learned at the high school that is constantly reinforced: being passionate about what you do makes a huge difference in your attitude towards hard work. Caring about your work makes those long nights, or frustrating projects, rewarding instead of draining.

Every month Tesla posts little newsletter notices in the bathroom, and they always come with a quote. This month's quote comes from Jane Goodall: "What you do makes a difference, and you have to decide what kind of difference you want to make." We each have to make decisions for our own lives, as well as for the impact we want to make on the lives of others. I am happy to know that the peers I met at SFWHS and WSP are out in the world, making a difference.

## Alumni Updates

**Lauren Cook (SFWS 2002)** is a Registered Nurse at SFGH and a Clinical Nurse Specialist in Geriatrics at UCSE.

**Haley Selmon (SFWS 2006)** is currently training for a post-graduate degree in Theater at the Royal Central School for Speech and Drama.

**Pietro Carini (SFWS 2011)** is about to leave for an Art and Architecture history class in Italy where he will be for about one month in Rome, Florence and Pompeii. Thank you Waldorf for all the love and guidance. *Auguri.*

## Alumni News

### Save the Date!

- GS Class of 2011 Reunion: March 7, 2015, 6:30-9pm Eurythmy Room, Grade School Campus
- GS Class of 1990 25-year Reunion: May 2015, TBA
- Summer Alumni Reunion: Saturday, June 20, 2015