



Annual General Meeting Notes

5/2/19

State of the School

In the last couple of years, the school has made significant progress in improving operational efficiency and effectiveness. Areas of focus include Financial, Salaries and Benefits, and planning processes. The work that is being done to achieve NYSAIS and AWSNA Accreditation for the school has been a significant contributor to this increased operational efficiency and effectiveness.

Multiple long-time members of the AWS community have indicated that the faculty is stronger top to bottom than it has ever been.

In the last year, marketing and enrollment have become an increasing focus of attention. With the school having significantly improved its operations, it can now focus more heavily on increasing enrollment

Accreditation Update included:

- Overview of the accreditation process through NYSAIS and AWSNA (analogous to an invasive medical procedure, with grueling preparation but an excellent picture of strengths and challenges).
- A summary of NYSAIS commendations and recommendations.
- Description of AWSNA status, October visit; both accreditations expected in 12-18 months.
- **Parent Survey** - Our appreciation for many helpful responses!
 - **Parent requests:**
 - More information, including articles, web links, etc., on Waldorf education, child development, what's going on in the classroom. (Teachers are addressing this.)
 - Study groups on foundations of Waldorf ed. (Dana Kemp, Parent Council Co-chair is already at work on this.)
 - Improved communication in general, including more user-friendly newsletter, e-mails home, etc. (Anna and office staff have been working on this.)
 - **Parent Affirmations:** Noted responses to Question 9 regarding whether the AWS program reflects our mission; positivity, enthusiasm, and understanding in virtually all 52 responses!

Questions welcome by all members of the Accreditation Team (Lisa Carrow, Nicole Covert, Maria Ebersole, Barb Farran, Anna Harp, Jane Ried).

Envision 2020

The Envision 2020 goal of doubling enrollment by the 2020 school year is intended to provide a focus for this increased marketing and enrollment effort. It is an aggressive goal but achievable. Ten years ago, at our peak, our enrollment in the grades was double what it is today.

Two meetings were held to raise community awareness of the Envision 2020 goal and to gather input and to enlist the support of the community towards achieving that goal. One idea shared that has the potential to be very effective is for each current AWS family to bring one new family to the school for an event. The Marketing and Enrollment Committee are implementing other suggestions from the Envision 2020 meetings, but the committee is small. Additional assistance from the broader AWS community is needed if we want to do more.

Current Marketing and Enrollment Efforts

The Marketing & Enrollment committee revised marketing and enrollment plan at the start of this year, but plan to hire an outside marketing firm to develop and begin implementing a more complete plan. Utilizing marketing professionals to help drive AWS marketing could yield significant benefits. Discussions with a candidate firm (Your People) that has experience working with other schools in general and other Waldorf schools have been ongoing and are reaching the final stage. An outside donation given with the express purpose of increasing enrollment is planned to be used to fund this work.

Marketing and Enrollments activities this year include:

- NPR ads have been and are being aired throughout the year
- The website received a complete overhaul. Usability of the website is significantly improved and is now better focused on providing information for people new to Waldorf education
- AWS magnets and lawn signs have been produced and are being distributed
- An open house was held on 5/4/19
- A Waldorf May Craft session is being conducted at the East Aurora Library on 5/15/19
- May Faire event has been opened to outside families that are hosted by existing families. Families are being encouraged to bring one outside family to May Faire on 5/18/19
- We will have an AWS presence at the upcoming Elmwood Festival for the Arts
- Waldorf 100 tie-ins to the global Waldorf 100 celebration are planned
- An AWS presence on Instagram has been established. AWS Parent Moira Winkler has experience with using Instagram to grow her own business and is using that experience to help build a following and communicate about AWS on Instagram. The content is curated by Marketing and Enrollment Committee Chair Brooke McAdam to ensure that information is consistent with our broader marketing plan.

More people involved in enrollment and marketing would mean the ability to do even more. Please contact Brooke McAdam, Johannes Aubrecht, or Anna Harp if you are willing to help. You may join an M&E committee meeting in person or via phone. If you have ideas you want to implement, come talk with them and see how that work can be integrated into the existing marketing and enrollment and marketing work. If you don't have specific ideas but have the enthusiasm and desire to help, join a meeting and talk with the committee about how you might be able to lend a hand.

Financial Update

Current year budget shows a deficit close to what was predicted at the beginning of the school year. With an incoming grant, restricted donations, and anticipated savings, it is expected that the current deficit will be halved, bringing it to about 2% of the total budget

- **Artisan Auction** raised more funds than predicted. Many thanks to all those who helped make this possible!
- **Annual Fund update:** Recently received a few large donations bringing the total to \$73,000! Nearly at the budgeted amount of \$100,000. Thank you to all those who have contributed! We continue to be grateful for all additional donations, however large or small
- **2019-2020 Budget forecast:** We expect to start the 2019-2020 fiscal year with a deficit. Any increase in enrollment will offset that number. Final budget numbers are presented to the Board of Trustees in September
- **Plans to eliminate the budget deficit and total school debt:** The goal is to go into the 2020-2021 fiscal year with the first balanced budget in many years.
- **Long-term debt elimination plan** includes refinancing current debt to be paid off in 10 years and to continue to increase the facility capital improvements line item.

The budget is available for AWS community members to review at any time. Any finance related questions may be directed to Jim Anderson.