

Survey on Waldorf School Trustee Education

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Background

Over the past 15 years a heightened degree of interest has been devoted to Waldorf school organizational life, and deservedly so. This interest has prompted a widening circle of Waldorf schools to recognize the need for greater professionalism and a spiritual approach to administration. At the same time, many have expressed the idea that school boards of trustees have received insufficient attention. Questions of board function—including the delicate issue of what to do when boards don't function well—are a lingering source of puzzlement and frustration. We hope that our research will contribute to a better understanding of Waldorf school boards and help to raise the level of discussion of questions of board function.

As directors of a training program focused on the organizational life of Waldorf schools, we appreciate the passion and desire for improvement that has driven discussions about trusteeship. It is our observation, however, that many of the sometimes divergent views about trusteeship have been fueled more by opinion than by data. As a result of these observations we decided to create a survey focused on trustee education.

Why trustee education? We believe that the window through which we query colleagues about trusteeship shapes the direction of conversation, so we gave considerable thought to how best to approach questions of trusteeship. It is our view that the quality and depth of the education that individual trustees bring to their task, or receive during their tenure, supports or limits what they can achieve collectively as a board. As educators, we are interested in exploring what kind of education Waldorf school boards provide for their trustees, what education trustees provide for themselves, how that education is obtained, and whether or not trustees believe they are being well-equipped to serve their school communities.

It is difficult, if not impossible, to talk about the education of trustees without talking about values. On the basis of which values do current Waldorf school trustees, and therefore their boards, operate? In our role as directors of the Waldorf Administration Program, we focus our curriculum on those approaches that support Waldorf pedagogy and that are consistent with anthroposophy. While we seek to display to the students as wide a set of methods of articulating those values as possible, it is up to students to interpret the values for themselves and integrate them into their work environments.

We summarize survey responses below, and, based on these responses, we offer some recommendations.

The Survey

We asked seven questions, six of them ending with an open-ended comment section, which yielded a number of specific responses.

1. What position(s) do you hold, have you held, or do you expect shortly to hold?
2. Indicate the level of your prior experience with nonprofit trusteeship.
3. Indicate any reading, studying, or training you personally have done on nonprofit trusteeship.
4. Indicate what familiarity you have with authors or methods of nonprofit trusteeship.
5. Share your opinions about your current board effectiveness.
6. Describe the practices of your board.
7. Please indicate what affects board decision-making.

To conduct the survey we distributed a link to Survey Monkey, a web-based survey service, via email. We sent four different messages over eight weeks in an effort to gain as much participation as possible. In the end we received 120 responses.

Responses

1. *What views and opinions do trustees (and others) have about trusteeship?*

The respondents, mostly trustees, but also some parents, teachers, and administrators who are not trustees, say that, for the most part, they are satisfied with the general level of practice and behavior of their boards. Many say, however, that they are not adequately serving their school, at least in part because the awareness, understanding, and study of Waldorf pedagogy and anthropology are insufficient.

2. *What level of experience is there on Waldorf school boards?*

Slightly more than 50% have two to seven years' experience. Fewer than 30% have seven or more years' experience as a trustee. In chairing board committees, levels are similar: 30% have chaired a committee, 28% have chaired a committee two or three times, and 19% have chaired a committee four times or more. 48% have served as board president, but only 20% have served as president two or more times.

We believe that, given the relatively few years of experience, the fact that trustees generally meet infrequently compared to faculty groups has implications for the potential quality of performance.

3. *What kinds of preparation have trustees and boards undertaken in order to perform their tasks?*

As individuals, sources for trustee preparation include, in descending order: books, magazines or journals, pamphlets, webseminars, and DVDs or videos. For boards as a whole, also in descending order, these include: workshop sessions, all-day workshops, multi-day workshops, and training programs.

More important than the order of these choices is the frequency of usage of these sources. The greatest number, only 41%, report some reading in magazines or journals. Given the relative lack of prior experience, this is troubling. For the full board, things are not much better. Here the greatest number, 37%, report they have done a small number of workshop sessions.

We asked the open-ended question: "Describe the kind of reading, studying, or training YOUR BOARD engages in." The wide variety of responses indicates that many boards are doing something. Are they, however, doing enough? And what type or quality of education are they undertaking?

One way we sought to gauge this was to ask respondents: "What authors or methods of trusteeship are you familiar with?" We selected six authors or methods of trusteeship that are, in our opinion, most widely read and recommended, and that have the highest profile in the contemporary nonprofit arena. The highest percentages reported point to the marginal effort trustees are making to gain knowledge and understanding. Only 19% had "heard of but only barely" John Carver and his Policy Governance method. In the higher ranked "have read some" category, the numbers are similar—17% for Robert K. Greenleaf and his servant leadership approach, and 19% for Carver. These are startlingly low levels of awareness or familiarity with writers who offer the fundamentals of the discipline of trusteeship.

Waldorf trustees face their task with low levels of prior experience and, as individuals and collectively as boards, they make only a nominal effort to prepare for and advance their performance on the job. This should be a concern for the Waldorf school movement and for boards of trustees themselves.

4. *How well do boards perform?*

Trustee selection, trustee orientation, cultivation of skills, and officer succession report the lowest performance levels, with two thirds or more ranking their performance as "Barely passable to Moderate."

Things improve in the areas of clarity of board's role, clarity or cultivation of board's vision, effectiveness of committees, transparency of nominating process, and willingness to participate in charitable giving. Here a solid two thirds or more report "Moderate to Very good."

Even better are the ratings for quality of board meetings and board-wide commitment to participate in board activities, where about two thirds report "Very good to Well done."

The lowest ratings are reported in connection with the areas of anthroposophical study and Waldorf education study, with about 25% ranking these “Extremely poor.” This contrasts with the areas of interaction with administration and quality of meaningful discussion, which greater than 25% report as “Well done.”

In the areas of interaction with administration, sticking to the agenda, quality of listening, and quality of meaningful discussion, the rating category of “Very good” received responses in the range of 50 to 65%. The areas of meetings starting and ending on time, inclusiveness of diverse views, interaction with faculty, and quality of facilitation received a lower rating, with a range of 39 to 50% “Very good.”

We also asked: “Out of which set of values do Boards of Trustees want their trustees, and therefore their boards, to be operating?” Here, 54% report that the role of Waldorf values is “Extremely important” and 46% say that the role of anthroposophy is “important” in guiding decisions and discussions. These responses present a strong contrast with the fact that a lower number, 36%, believe that trustees being on a path of self-knowledge is “important.”

Our perception is that, overall, trustees try hard and bring good intentions and vitality to their boards. By their own measure, however, they are significantly underperforming in the areas of defining and cultivating leadership, and integrating Waldorf education and anthroposophical concepts.

Conclusion

Waldorf school trustees around the continent view their boards as performing moderately well with regard to the technical competencies of details such as running meetings and reaching decisions. Beyond these, however, performance suffers.

First, there is tension between trustees’ lack of experience and the relative lack of effort that they expend to gain needed knowledge and skills. Boards of trustees can make clear improvements by improving member selection and orientation and planning for succession.

Second, there is tension between the view that knowledge and understanding of Waldorf pedagogy, values, and anthroposophy are important and the lack of commitment that trustees

and boards report to gain this knowledge and understanding.

Third, there is tension between the acknowledged importance of school boards and our commitment to provide the training and support that trustees need.

Fortunately, we are not without resources. We have a body of knowledge, aligned and consistent with Waldorf pedagogy, that can point us in the direction to develop and create a curriculum for Waldorf trustees. We can look to the many lectures that Rudolf Steiner gave on social development. These are widely studied, for example, in the Camphill movement. In addition, we can find contemporary concepts and philosophies of trustee practice that are consistent with an anthroposophical approach to trusteeship. These, too, need to be a part of trustee education.

Values are not just what we say we believe. They are also expressed in what we do. One solution to the tensions outlined above and illuminated by our survey is to gather the resources necessary to develop and direct affordable, flexible, and geographically diverse training and education for Waldorf trustees.

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