

**THE GUIDEBOOK  
FOR  
WALDORF BOARD DEVELOPMENT  
2023**





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THE RESOURCES AND NOTES FROM THIS WORKSHOP CAN BE FOUND ON LEADTOGETHER.ORG under the title Resources for Board Development

Leadtogether is a free collection of resources for Waldorf school development.

## Bios and LWS background



### Connie Stokes

Connie has been active in Waldorf education for many years, as an administrator in Chicago, Honolulu, Los Angeles, and Portland. She was an executive at AWSNA and has served AWSNA and the movement in many capacities over the years. Currently she is the project manager of the Board Training.



### Valerie Colis

Valerie is currently the Chair of the AWSNA board. She has been the chair of the Chicago Waldorf School board and an advisor to Waldorf school boards. Valerie is on the presenters team for the board project.



### Lisa Mahar

Lisa recently retired after 25 years as administrator of Monadnock WS. She has taught, was a co-founder of DANA, and has consulted with and advised schools across N America.



### Michael Soule

Current co-director of Leading with Spirit Michael has 30 years experience in Waldorf Education as a teacher, administrator, consultant, advisor and trainer.

*Learn more about Leading with Spirit and its programs at [LeadingwithSpirit.org](https://LeadingwithSpirit.org)*

## **The Motto of the Social Ethic**

The healing 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.

Rudolf Steiner

## **Qualities of a Healthy Organization**

Relevant Mission, Clear Vision

Future Oriented

Guiding plan

Cohesive Core

Well supported, trained, committed staff

Teamwork, Collaboration

Culture of service

Reflective practice

Effective processes and structures

Sufficient Resources

# The Mission of Waldorf Education

The purpose of Waldorf Education is to create communities where people develop, Where adults and children alike unfold their capacities - imaginative thinking, empathic feeling, and compassionate service to the world and their fellow human beings.

Deeply rooted in the insights of Rudolf Steiner and reflective practice,

The Waldorf school strives to be a community:

Where practical action and spiritual insight are balanced and inform each other,

Where truth, beauty, and goodness prevail,

Where both the strengths of each individual and a sense of the whole community are living, and

Where people are united through their warmth of heart to work together towards

Social healing and social justice.

What makes a good mission statement?

What's difference between mission and vision?

# **Board Responsibilities in a Waldorf School**

## **Core Responsibilities of a Board**

To act in the public trust to assure that the organization upholds the regulatory (Legal) and financial (Fiduciary) laws of the land including protecting the rights of members of the community, and to ensure that the organization stays true to its mission - does what it says it does with integrity.

These core responsibilities are included in and supported by the membership processes of the Association of Waldorf Schools.

To support the school in operating with attention to the core principles of Waldorf Education as articulated by AWSNA.

## **Six core areas of board work encompassing board responsibilities.**

### **All School Governance**

To develop and maintain a well-defined structure within which all work of the school is to be completed. The work is guided by a desire to foster trust, to provide clarity and clear communication, and to nurture and support efficiency and competency in all the working of the school.

### **Long Term Planning and Financial Sustainability**

Ensure that the school has a sound financial strategy for sustainability (how to sustain financial support, staffing and pedagogical program.)

### **Resource Development and Philanthropy**

Ensure that the individual members and board as a whole participate in and provide leadership for raising annual and long term capital.

### **Community Development**

To ensure that the school has a healthy interactive relationship with its own parent community, its alumni and the greater community.

### **Operational Oversight**

Ensure that school maintains a healthy functioning administration by providing support, evaluation and supervision to the School Leadership

### **Board Development**

Ensure the Board membership is maintained, that Board members conduct themselves in line with their assignments, provide support to ongoing success of members, including goals, reviews and evaluations, and assure healthy and effective board meetings.

# Universal Duties of Board Members: Care, Loyalty, Obedience

## Duty of Care:

- Actively participate in the work of the board and the work of the school.
- Be prepared for meetings by reviewing all materials
- Commit to advancing the mission and goals of the school.
- Come to meetings with an open mind and heart
- Don't decide on a "position" ahead of time, but let the dialogue, exchange, and insights guide you to your position
- Develop the knowledge, skills, and understanding to read and evaluate financial documents like the balance sheet, the budget, cash flow monitoring, and the audit results
- Engage in and support strategic planning and generative thinking

## Duty of Loyalty:

- Place whole-school organizational interests above personal interest at all times in all ways
- Remember that you are not a representative, obligated to your group—the board is your group
- Take constant care with confidential matters and with sensitive matters, as well
- Remember that carrying confidential or sensitive information with care is a core element in building trust ("Change at the speed of trust." --Stephen Covey)
- Be aware of, disclose, and manage conflicts of interest
- Officially disclose material conflicts of interest in a signed document each year

## Duty of Obedience:

- Abide by all regulations and laws
- Be sure all activities are consistent with founding documents and bylaws
- Commit to both the letter and the spirit of agreements
- Uphold and support decisions made by the board
- Avoid factionalism and any small group activity not clearly requested by the board as a whole
- Communicate frequently and with clarity, consistency, and respect
- Avoid surprises by keeping others fully informed

## Board Member as Trustee

The board is officially entrusted by the state and the IRS with the responsibility to ensure that the organization adheres to its mission and its purpose legally and ethically. In this regard, members are called trustees. They are members of the board. They are trustees of the institution.



**National Association of Independent Schools**  
***Principles of Good Practice for School Boards***

**Overview: The board is the guardian of the school’s mission. It is the board’s responsibility to ensure that the mission is relevant and vital to the community it serves and to monitor the success of the school in fulfilling its mission.**

**Principles of Good Practice:**

1. The board adopts a clear statement of the school’s mission, vision, and strategic goals and establishes policies and plans consistent with this statement.
2. The board reviews and maintains appropriate bylaws that conform to legal requirements, including duties of loyalty, obedience, and care.
3. The board assures that the school and the board operate in compliance with applicable laws and regulations, minimizing exposure to legal action. The board creates a conflict of interest policy that is reviewed with, and signed by, individual trustees annually.
4. The board accepts accountability for both the financial stability and the financial future of the institution, engaging in strategic financial planning, assuming primary responsibility for the preservation of capital assets and endowments, overseeing operating budgets, and participating actively in fundraising.
5. The board selects, supports, nurtures, evaluates, and sets appropriate compensation for the head of school.
6. The board recognizes that its primary work and focus are long range and strategic.
7. The board undertakes formal strategic planning on a periodic basis, sets annual goals related to the plan, and conducts annual written evaluations for the school, head of school, and the board itself.
8. The board keeps full and accurate records of its meetings, committees, and policies and communicates its decisions widely, while keeping its deliberations confidential.
9. Board composition reflects the strategic expertise, resources, and perspectives (past, present, and future) needed to achieve the mission and strategic objectives of the school.
10. The board works to ensure all its members are actively involved in the work of the board and its committees.
11. As leader of the school community, the board engages proactively with the head of school in cultivating and maintaining good relations with school constituents as well as the broader community and exhibits best practices relevant to equity and justice.
12. The board is committed to a program of professional development that includes annual new trustee orientation, ongoing trustee education and evaluation, and board leadership succession planning.

## **NAIS PRINCIPLES OF GOOD PRACTICE FOR INDEPENDENT SCHOOL TRUSTEES**

**Overview:** The following Principles of Good Practice are set forth to provide a common perspective on the responsibilities of individual members of independent school boards.

### **NAIS Principles of Good Practice:**

1. A trustee actively supports and promotes the school's mission, vision, strategic goals, and policy positions.
2. A trustee is knowledgeable about the school's mission and goals, including its commitment to equity and justice, and represents them appropriately and accurately within the community.
3. A trustee stays fully informed about current operations and issues by attending meetings regularly, coming to meetings well prepared, and participating fully in all matters.
4. The board sets policy and focuses on long-range and strategic issues. An individual trustee does not become involved directly in specific management, personnel, or curricular issues.
5. The trustee takes care to separate the interests of the school from the specific needs of a particular child or constituency.
6. A trustee accepts and supports board decisions. Once a decision has been made, the board speaks as one voice.
7. A trustee keeps all board deliberations confidential.
8. A trustee guards against conflict of interest, whether personal or business related.
9. A trustee has the responsibility to support the school and its head and to demonstrate that support within the community.
10. Authority is vested in the board as a whole. A trustee who learns of an issue of importance to the school has the obligation to bring it to the head of school, or to the board chair, and must refrain from responding to the situation individually.
11. A trustee contributes to the development program of the school, including strategic planning for development, financial support, and active involvement in annual and capital giving.
12. Each trustee, not just the treasurer and finance committee, has fiduciary responsibility to the school for sound financial management.

# Association of Waldorf Schools of North America (AWSNA)

## Principles for Waldorf Schools

Founded in the early 20th century, Waldorf education is based on the insights and teachings of world-renowned artist and scientist, Rudolf Steiner. Guided by these insights, AWSNA members have adopted the following seven **AWSNA Principles for Waldorf Schools**. These principles articulate the most important values that inform the policies and practices of Waldorf schools in North America and are held as a central tenet of our schools' accreditation process.

### **1. THE IMAGE OF THE HUMAN BEING AS A SPIRITUAL BEING INFORMS EVERY ASPECT OF THE SCHOOL.**

Waldorf schools work actively with insights from Rudolf Steiner about the incarnating human being. One core insight is that the human being is a threefold being of body, soul, and spirit. Waldorf education enlivens the physical, emotional, intellectual, social, artistic, and spiritual capacities of the human being as the individual moves through the phases of this life.

### **2. WALDORF SCHOOLS FOSTER SOCIAL RENEWAL BY CULTIVATING HUMAN CAPACITIES IN SERVICE TO THE INDIVIDUAL AND SOCIETY.**

Waldorf schools foster development so that, throughout life, individuals are motivated to serve humanity with a strength of will, depth of feeling, clarity of thought, and the ability to work with others. The educational program is designed to strengthen these fundamental human capacities in our students.

### **3. ANTHROPOSOPHICAL UNDERSTANDING OF CHILD DEVELOPMENT GUIDES THE EDUCATIONAL PROGRAM.**

Waldorf schools work with the gradual development of the human being from child to adult. This development follows an archetypal sequence of three seven-year phases. During this time, the soul and spirit progressively take hold of the physical body. Each child's development is a unique expression of the human archetype. Each phase has characteristic physical, emotional, and intellectual dimensions.

The educational program is developed out of this understanding. Core components of the educational program include the student-teacher relationship; the artistic approach; working from experience to concept; working from whole to parts; use of rhythm and repetition; and observation as the foundation for assessment. Each approach is tailored to meet the students in each phase of child development.

Thus it is essential that teachers have formal preparation in Waldorf pedagogy or are engaged in such preparation.

#### **4. WALDORF SCHOOLS SUPPORT FREEDOM IN TEACHING WITHIN THE CONTEXT OF THE SCHOOL'S SHARED AGREEMENTS.**

The educational program of each Waldorf school is founded on Rudolf Steiner's insights about the growing child, informed by the teachers' ongoing study of anthroposophy and their professional development in Waldorf education. The faculty of the school works collaboratively and cooperatively to develop, refine, and periodically review the educational program. Individual teachers work creatively with curricular, pedagogical, and assessment components of the program out of freedom and in a way that serves their individual students, the class as a whole, and the school community. This work reflects and respects the shared educational understandings and agreements of the faculty.

#### **5. THE CONSCIOUS DEVELOPMENT OF HUMAN RELATIONSHIPS FOSTERS INDIVIDUAL AND COMMUNITY HEALTH.**

Enduring human relationships between students and their teachers and among the children themselves are at the heart of Waldorf education. The teacher's task is to work with the developing individuality of each student and with each class as a whole within the context of the entire school. These relationships gain in depth and stability when they are cultivated over multiple years.

Healthy human relationships with and among parents and colleagues are essential to the well-being of the school. Members of the community are invited to join in developing meaningful, collaborative, transparent forms for working together. Each individual's self-development is encouraged since it is key to the well-being of the whole.

#### **6. SPIRITUAL DEVELOPMENT IN SUPPORT OF PROFESSIONAL GROWTH IS AN ONGOING ACTIVITY FOR THE FACULTY, STAFF, AND BOARD.**

Members of the faculty, staff, and board work in an ongoing way to cultivate their spiritual development with the help of anthroposophical and other study. Waldorf schools create opportunities for shared educational study, artistic activity, mentoring, and research to further this growth and development in service to the students.

#### **7. COLLABORATION AND SHARED RESPONSIBILITY PROVIDE THE FOUNDATIONS OF SCHOOL LEADERSHIP AND GOVERNANCE.**

Waldorf schools are self-administered. This work is strengthened by cultivating a shared anthroposophical understanding of social interaction. Faculty, staff, and the board share responsibility for guiding and leading the school in the following manner:

a) The educational program is developed by the faculty under the guidance of the pedagogical leadership of the school.

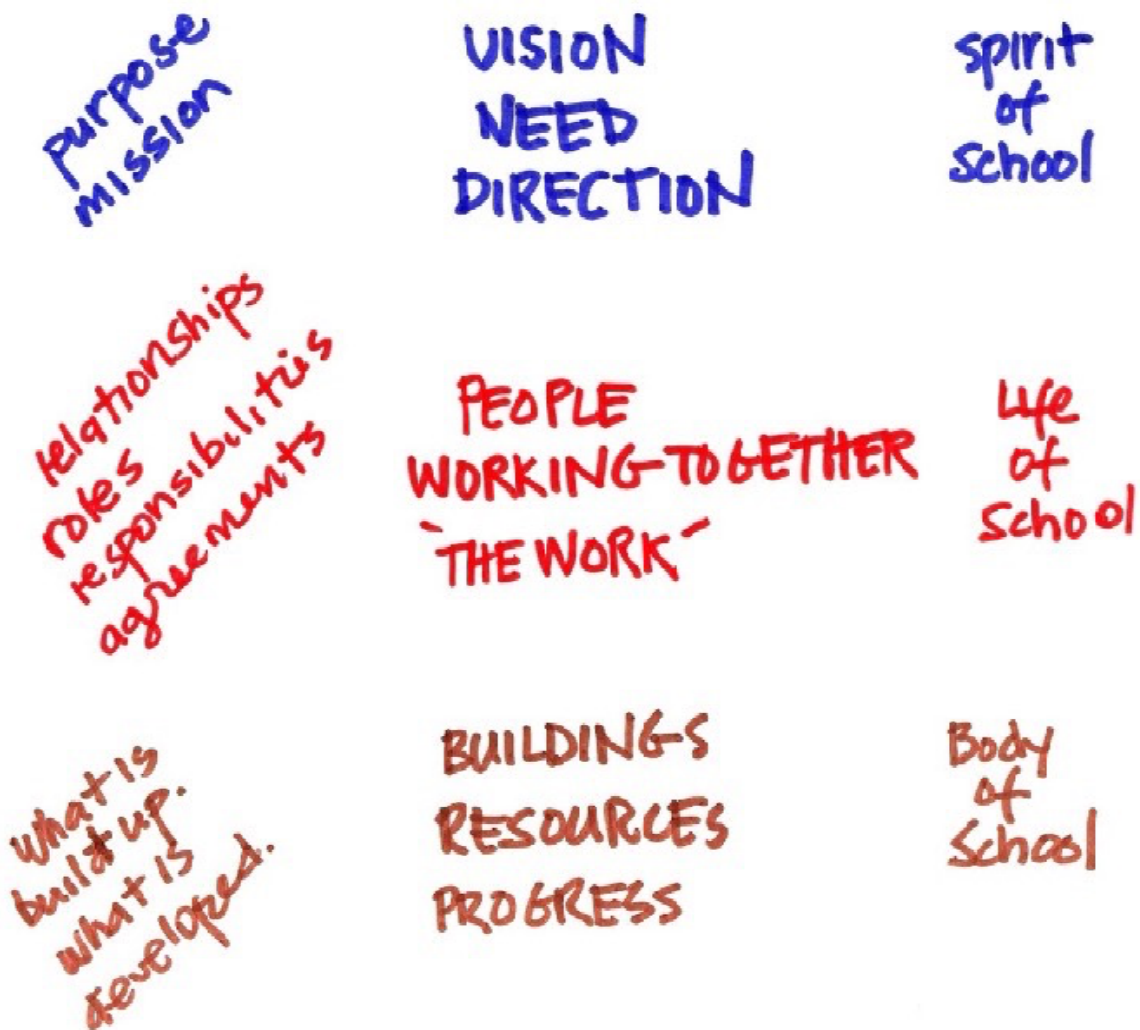
b) Administrative activities further the educational program.

c) The board works strategically to enable legal and financial health in order to realize the mission and vision of the school.

Governance of the school is structured and implemented in a manner that both cultivates collaboration and is effective.

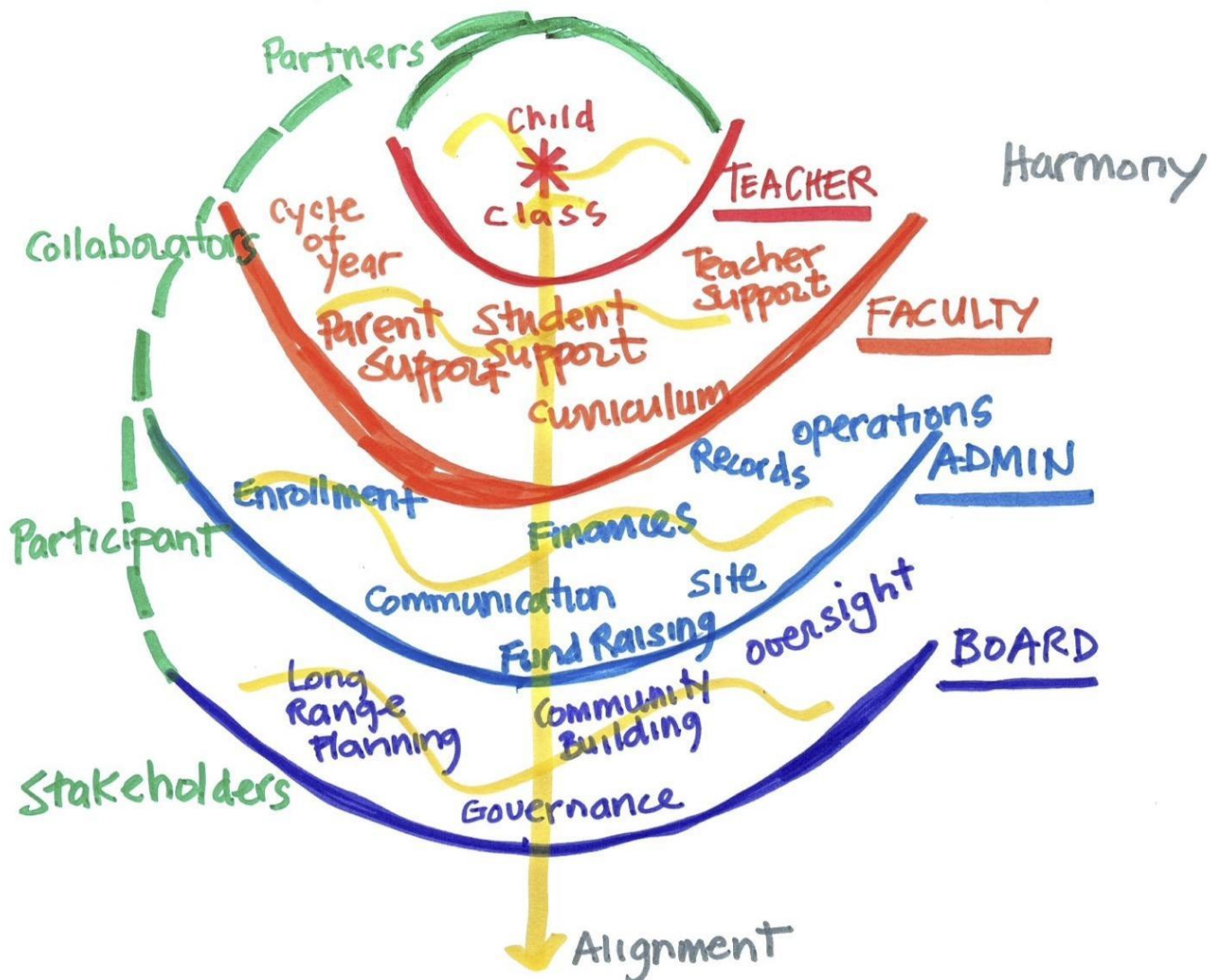
## Social Threefolding: The organization in image of human being

This diagram describes the organization in the light of the threefold work of Bernard Lievegoed, his research center in the Netherlands (NPI), and the Social Development Centre of Emerson College, an Anthroposophical College in England. It attempts to outline the Seven Levels of an Organization (middle) described as three areas, including the body and physical aspect of the school, the life and social community aspect, and the spiritual or identity aspect of the school. The school, like a human being, has a continual dialog with all three aspects of its life. For further about this, please see *Phases of School Development in Partnerships of Hope*, by Chris Schaefer.



## Archetypal Structures and Processes of school

This diagram was developed by Leading with Spirit colleagues as an archetypal imagination of the structure of the school and the many processes and relationships between different areas of activity (realms) and the people involved in the community as teachers, parents, staff and volunteers. The imagination shows the whole organization with the child at the center and concentric rings of support around that, continuing out to the “skin” of the organization that separates it from the world and allows it to be its own entity. As a living entity, the school has many dynamics. In studying the picture one can see the primary processes in different realms, and their relationships in and between their realms. The parents are unique partners in all levels of the school. A central question for all living organisms is how to maintain internal harmony and integration while maintaining a mutually supportive relationship with its environment- the greater community - out of which its nourishment is given.



## Primary Responsibilities of the Board

### GOVERNANCE

**Determine mission and purpose.** It is the board's responsibility to create and review a statement of mission and purpose that articulates the organization's goals, means, and primary constituents served.

### ADMIN SUPPORT

**Select the chief executive.** Boards must reach consensus on the chief executive's responsibilities and undertake a careful search to find the most qualified individual for the position.

**Support and evaluate the chief executive.** The board should ensure that the chief executive has the moral and professional support he or she needs to further the goals of the organization.

**Ensure effective planning.** Boards must actively participate in an overall planning process and assist in implementing and monitoring the plan's goals.

**Monitor and strengthen programs and services.** The board's responsibility is to determine which programs are consistent with the organization's mission and monitor their effectiveness.

### FINANCIAL SUSTAINABILITY PLANNING

**Ensure adequate financial resources.** One of the board's foremost responsibilities is to secure adequate resources for the organization to fulfill its mission.

**Protect assets and provide proper financial oversight.** The board must assist in developing the annual budget and ensuring that proper financial controls are in place.

### BOARD DEVELOPMENT

**Build a competent board.** All boards have a responsibility to articulate prerequisites for candidates, orient new members, and periodically and comprehensively evaluate their own performance.

**Ensure legal and ethical integrity.** The board is ultimately responsible for adherence to legal standards and ethical norms.

### COMMUNITY OUTREACH AND CONNECTION: INSTITUTION GROWING AND CONNECTING

**Enhance the organization's public standing.** The board should clearly articulate the organization's mission, accomplishments, and goals to the public and garner support from the community.

From: National Center for Non Profit Boards, with notations by LWS

## Organizing Board Work

The essential areas of work that support the success of the board in serving/stewarding the school.

### Governance

Nurturing and supporting the clear, consistent and integral work of the organization.

*To develop and maintain a well-defined structure within which all work of the school is to be completed. The work is guided by a desire to foster trust, to provide clarity and clear communication, and to nurture and support efficiency and competency in all the working of the school.*

Elements: Mission, vision, values, bylaws, policies, regulations, roles, responsibilities

Tools: Supporting documents: Governance Imagination, community handbook, mandates

### Administrative and Operations Oversight

Nurturing and supporting the creative work of the school's operational and pedagogical leadership.

*Ensure that school maintains a healthy functioning administration by providing support, evaluation and supervision to the School Leadership. This work engenders a sense of safety, throughout the community and a sense of renewal - that the community and its members are learning and growing.*

Elements: Joint planning sessions, regular reporting requirements, leadership reviews and evaluations,

Tools: Supporting documents: Cycle of annual reviews

### Community Development

Nurturing, supporting, and leading mutual work within the school's inner and outer community

*To ensure that the school has a healthy interactive relationship with its own parent community, its alumni and the greater community.*

Elements: Annual meetings, community surveys, connections with other institutions, parent and alumni

Tools: Supporting documents: Identified community networks

### Long Range Planning and Sustainability

Nurturing, supporting and leading the healthy growth and development of the school into the future

*Ensure that the school has a sound financial strategy for sustainability ( financial support, staffing and pedagogical programs.) The work is guided by a desire to foster hope, inspiration, and confidence about the future*

Elements: Planning, resource development, funding campaigns

Tools: Supporting documents: Road map - Strategic Plan

### Resource Development and Fundraising

Providing leadership and support for nurturing non-tuition resources

*Ensure the Board membership, individually and as a whole, participates in and provides leadership to the cultivation of relationships leading to raising annual and long term capital for the school.*

Elements: Individual giving, major donor cultivation, annual fund, capital campaigns, major events

Tools: Supporting documents: Giving program handbook

### Board Development

Nurturing, supporting and managing the healthy growth and development of the board

*Ensure the Board membership is maintained, that Board members conduct themselves in line with their assignments, provide support to ongoing success of members, including goals, reviews and evaluations, and assure healthy and effective board meetings. In this work, the board is a microcosm of the whole school and works to practice and foster trust, confidence, connection, safety and renewal.*

Elements: Recruitment, onboarding, meetings, culture, member support, leadership

Tools: Supporting documents: Board handbook



## **Organizing Board work -2-**

The following is a list of factors that support the healthy work of any individual or group in the school. These can be guidelines for work in committees, task groups and the board itself.

### **Factors that support success of the work in essential board tasks**

#### **Centered on purpose**

Establishing clarity around the need and goals of the group

#### **Identified leadership**

Supporting qualified and enthusiastic individuals and teams to carry out the work

#### **Rhythmic practices**

Bringing the work into natural, appropriate cycles

#### **Cycles of action and reflection**

Regularly creating and implementing action plans, reviewing, evaluating, and improving the work

#### **Community involvement/engagement**

Creatively and responsibly engaging and informing stakeholders in the work

#### **Upholding shared values**

Connecting the work to common values that guide the community

### **Balancing tasks and relationships**

Paying attention to the balance between fostering relationship and completing tasks

### **Keeping track of your work**

Paying attention to keeping clear and accessible records of your activity

## The Keys to Collaboration

This outline is a part of a collection of articles about Collaboration in Waldorf Schools available on [Leadtogether.org](http://Leadtogether.org), developed by LWS

- **A commitment to a common vision, shared values, and clear goals.**
- Individuals **empowered to take initiative and step into leadership** roles according to their capacities.
- **Clear roles & responsibilities** and ways of supporting individuals to be successful in their roles.
- **Building of safe space & trust within & between groups** through transparency, communication consistency, tolerance, and forgiveness.
- **Open mindedness** towards other points of view, experiences, contributions, and styles
- **Equanimity** in relation to one's own feelings and to the actions of others.
- **Ongoing reflection** by individuals and by groups - conscious review of intentions, processes, and interactions.
- **Interest by each individual in the growth and development of the other individuals involved in the group** - accepting that each person is on their own unique path of development.
- **Understanding that the health of a group depends on the health of the individuals involved** – being committed to finding ways that both the individual and group can grow simultaneously.

## Healthy meetings



### The Art of Planning and Preparing for Meetings

There are three kinds of meetings – social encounters, meetings to study and learn something, and meetings where people come together to accomplish a task. Each of these kinds of meetings has its own character, but some of the dynamics of each are present in every meeting. Meetings are an essential part of our life in organizations and especially important in the practice of collaboration.

At the end of a meeting we know how successful the meeting was by how we feel. Meetings that flow well, where there are healthy interactions and in which we touch on something important tend to leave us more energized than when we started the meeting. Meetings that are poorly planned, are not well facilitated and where something important isn't touched on tend to leave us feeling exhausted or frustrated.

While spontaneous meetings can be exhilarating, meetings that are consciously and artfully planned and executed have the possibility of leaving us much more empowered and strengthened. The keys, therefore, to creating more empowering meetings lie in how we go about planning, facilitating and following up. In this newsletter, we explore the art of how to plan and prepare for meetings.

An agenda can be a powerful tool. When the purpose, the process, the content, the flow and the possible outcomes are well thought out beforehand, it is more likely that the meeting will be effective and empowering. Groups waste inordinate amounts of time and energy in underprepared meetings. Does everyone know what the meeting is about, what is going to happen, what is expected of them and what it is hoped the group will accomplish? Are the people leading sections of the meeting prepared? Have materials that participants need to read ahead of time been sent out in time for them to be read?

The three below and a number of the related resources ( all available on [www.leadtogether.org](http://www.leadtogether.org)) explore more in depth the dynamics of healthy meetings and the preparation of effective agendas.

The **Art of Creating an Agenda** is an article that outlines some key elements to consider in planning a meeting.

In the article **Working Together** from his book *Paths to Partnership*, Chris Schafer illuminates the dynamics of a meeting, the importance of the various roles in the meeting, and ways that groups can reflect on their meeting practice regularly – all are valuable to continually improving meetings.

In the article **Making Space for Spirit**, Holly Koteen sheds light on ways that leaders can create space in meetings to allow for the highest in each person and in the group to shine through.

## General Principles of Leadership

Leadership is a quality of the human being and is threefold in nature, connected to the soul life of Thinking, Feeling, and Willing, the higher capacities of imagination, inspiration and intuition, and the three dialogs – with the spirit, the social community, and the earth.

Every individual has his or her own unique configuration of leadership qualities.

Every social process requires an element of leadership. Successful leadership requires an understanding of social process.

Every group requires leadership. Newer groups and groups just forming often require more formal/structured leadership. More mature groups usually require less formal/more collaborative leadership. This is related to the relationship of the individuals to each other and to the whole.

Groups and organizations require different qualities of leadership at different times and for different tasks.

Leadership is realized in meetings. In every meeting, each of the elements of process, interaction and content are present and need to be tended to.

Leadership in meetings is enhanced and more effective by preparing and planning.

Every organization has a structure and culture of leadership related to its mission and biography and the individuals involved.

Effective leadership requires the building of trust and confidence.

Trust is built from:

- Consistency, follow through
- Presence, listening, interest in others
- Integrity, humility
- Positivity (no blame) and Openness (no judgment)
- Communication (clear, timely, open and reflective)

Successful administrators (and lead positions) exercise different qualities of leadership in different situations and groups.

Greenleaf's Servant Leadership is highly congruent with the soul needs of the times.

## Leadership Qualities

*Leadership qualities are aspects of the realized human being. They are the conscious exercise of human capacity rising above reaction (arising from the past) towards responsibility (calling from the future).*

Awareness of, respect for, and interest in the whole  
Listening, being present  
Care for and interest in others  
Connecting  
Supporting, nurturing  
Inspiring, envisioning  
Communicating  
Modeling  
Guiding  
Facilitating  
Advising  
Deciding  
Resolving, problem solving, contingency facilitation and management  
Boundary holding and limit setting, upholding, protecting, challenging  
Enforcing, holding accountability  
Planning  
Steadfastness and dedication  
Calm in the face of challenges

## Building Trust

- Openness of heart, mind, and will
  - A willingness to suspend judgment and take a fresh interest in others.
- Consistency
  - Rhythm, transparency and communication diminish surprises and unplanned changes that tend to undermine trust
- Follow through
  - Remembering and doing what was agreed upon.
- Kindness
  - An ability to respect and treat others with positivity and equanimity.
- Dedication
  - Every person is developing. We can be helpful to each other.
- Collaboration
  - A willingness to set aside differences in working towards a common goal.
- Embracing conflict
  - A willingness to see conflict as normal, and to work through it as a learning process. Not to retreat into reaction.

## Developing as a group: Making space for Spirit, Generative dialog (excerpts)

*When Rudolf Steiner brought together the individuals who would become the teachers of the first Waldorf School, he asked them to work in a new way, not only with the children, but also with one another. He asked them to work together in such a way as to invite the interest and guidance of spiritual beings into their endeavor...*

*Understanding meetings as an art form and using an artistic approach in planning and carrying out a meeting will more likely allow participants to be refreshed and inspired at the meeting's conclusion. While including an artistic activity in the agenda can be helpful, it is more critical that the meeting itself be artistic and display the wholeness, drama, and dynamics of any other artistic creation. Artistic activity can often be a doorway to the recognition of spiritual archetypes and the building of spiritual understanding. A meeting that is conducted as a form of art greatly enhances this possibility for the participants.*

*We know what it feels like to have participated in a successful meeting. We are enlivened at the meeting's end. We also know that what occurred could not have been achieved by any individual member of the group. These are indicators of spirit presence. It is possible to learn how to create such meetings—meetings that lift us out of our ordinary awareness and allow us the possibility of working more consciously with the spiritual world. We can create more space for spirit in our meeting life in the following ways.*

From Making Space for Spirit. Holly Koteen Soule

### Some Suggestions

Take interest in the other – biography sharing, touch ins, social times

Share common values – reading verse or mission

Generate insights – open ended discussions, reading and discussing a passage

Include imaginative pictures – drawing, sharing frameworks, seek images

Breathe – vary activity, take breaks, sing

Reflective practice – end of meeting review, seasonal reflection, annual evaluation

Please see the whole article here on Leadtogether

**The Artistic Meeting: Making Space for Spirit** by Holly Koteen-Soulé

<https://leadtogether.org/artistic-meeting-creating-space-spirit/>

## The Art of Board Recruitment - Leading with Spirit

*The following is an overview of the basic principles and practices of building a vibrant board through a healthy recruitment process. Additional Resources about Board Recruitment can be found at [www.leadtogether.org](http://www.leadtogether.org)*

*The board has the goal to develop a vibrant recruitment process by gaining an understanding of the various elements of board recruitment, and to put into place a process and team to move forward with recruitment for the board.*

### Board Recruitment

The continuity and integrity of the work of the board is supported by the processes by which the board forms and reforms, supports and nurtures its membership.

The typical aspects of the board development that contribute to success include:

- Well defined, clarity of purpose
- Understanding the role of individual within the board
- Understanding the culture of the board's collaborative rhythmic work
- Understanding the role of the board in the organization
- Understanding the role of the school in the community and greater world
- Clear, regular, rhythmic processes for recruitment, onboarding, review and evaluation, and professional development.

### The goals of recruitment are to:

Continuously ensure that the board has the right number of members with sufficient attitude, experience and skills to effectively carry the work of the board.

### A few basic principles:

- Board recruitment is a hiring process for a part time employee, volunteer.
- Many basic hiring principles apply
- Compensation is an intangible
- Every recruit is interested because they
  - Believe in the endeavor – have an interest in its success
  - Appreciate the culture of the work
  - Feel that they can contribute in a positive way
  - See this as a contribution to society
  - Feel like they have something they could learn
- Recruitment is an important job of the whole board and is best served by a team on the board.
- The unique role of a board member, being a volunteer, being expected to carry the whole institution forward, and being given a high level of responsibility to participate in crucial decisions about the school, requires a thorough process.

### Elements of success

- Trustees are more successful if they:
  - Have a natural link to the organization's mission
  - Have a specific role and responsibility on the board that suit their talents
  - Have a clear job description



Have opportunity to experience the working of the board before joining  
Have a thorough onboarding process  
Have had some prior board experience and/or training

**Typical tools include:**

Board Handbook (will include all of the below)  
Board mandate  
Board member Job description  
Conflict of interest contract  
Directors and Officers insurance  
Review and evaluation process  
Board meetings: Agendas and Minutes  
Board Workplan  
Board Management support system

**Recruitment process**

Board identifies needs  
Board identifies potential candidates  
Initial conversation, inviting interest  
Initial interview  
    Getting to know each other  
    Outline process  
    Describe the members and work of board  
    Describe why interest  
    Learn about background etc.  
    Invite application  
Review application, vet with faculty and staff  
Invite to board meeting  
Follow up conversation  
Invite to be board member

**Onboarding**

Provide board handbook (affirm they have read it)  
Sign conflict of interest agreement  
Include in meetings, add to mailing list  
Give access to board workspace  
Announce/introduce to community  
    Intro by board, short letter from new member  
Assign to committee  
Assign mentor  
Send to training

**Recruitment System**

Recruitment annual calendar  
Tracking chart (see template)  
Application (see sample)  
Interview (see template)  
Job Description (see sample)

# **The Role of the Board in Advancing Diversity, Equity, Inclusion, Justice and Belonging in the school**

## **Diversity work in any organization requires three levels of attention.**

- Every individual is responsible.
- Every group is responsible.
- The whole community is responsible.

## **The work at every level, from individual to whole school calls individuals and groups:**

- To be informed, conscious, and active
- To be aware of and informed about current emerging issues in the culture related to DEIJ
- To understand the language, concepts and challenges related to DEIJ.
- To be active in self-reflection, self-responsibility and continuous growth and learning. To contribute to the community discourse, and be willing to identify, call out and work to transform the biases, practices, structures, and systems that hinder DEIJ.

## **Examples of Board Responsibility for Diversity**

### **Governance**

- Ensure that the school's mission, vision and values include DEIJ.
- Ensure that DEIJ responsibilities live in each job description and group mandate.
- Ensure that opportunities for inclusion live in recruitment for all positions.

### **Planning and financial vitality**

- Develop a plan for acquiring and allocating funds for DEIJ activities in the school.

### **Oversight of Operational Leadership**

- Ensure that DEIJB activities are integrated into the overall responsibilities of Operational Leaders
- Ensure that DEIJ goals are established by Operational Leaders with appropriate measures of review and evaluation.

### **Ambassadorship**

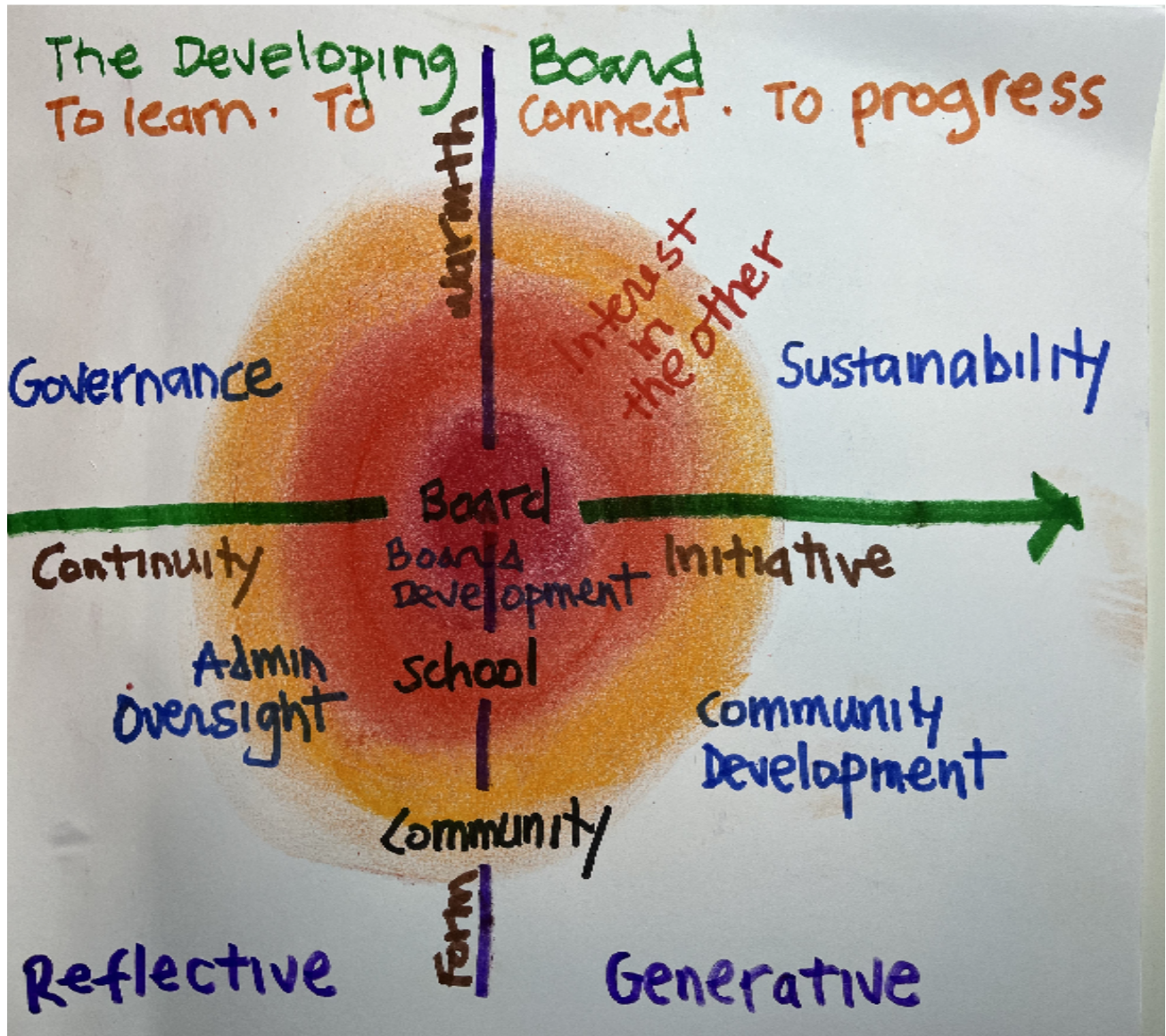
- Ensure that the organization is connected to the Social Justice community in the local area.

### **Board Development**

- Set appropriate goals and times for ongoing study, biography work, and explorations for board members and the whole board.

## Finding harmony and alignment

This diagram was developed from ideas in a lecture by Jorgen Smit, a Norwegian Waldorf Teacher, and World Pedagogical Section Leader. In his lecture he identifies four aspects of life and community that are continually at play – Warmth, Initiative, Continuity, and Form. In this diagram, we have related them to the work of the board. This is the final slide in a progression. See Jorgen Smit's article and the PowerPoint slide progression at [www.leadtogether.org](http://www.leadtogether.org)



## **A Guiding Star**

Seek the truly practical material life

But seek it so that it does not numb you to the spirit.

Seek the spirit but seek it, not in passion for the super-sensible

But seek it because you wish to apply it selflessly in the practical world  
in the practical life.

Turn to the ancient principle,

Matter is never without spirit and spirit is never without matter

In such a way that we say

We will do all things in the light of the spirit,

And we will so seek that light of the spirit that it evokes warmth for us  
in our practical activities.

## **Rudolf Steiner**

**A notebook of resources accompanying this workshop can be found at  
Leadtogether.org, in the resources section, under the title Waldorf School  
Workshop Resources**

## **Some Additional Resources Helpful to Boards**

### **About Leading with Spirit**

On the LWS website [www.leadingwithspirit.org](http://www.leadingwithspirit.org)

### **Qualities of a Healthy Organization**

Partnerships of Hope: Building Waldorf School Communities, Chris Schaefer

### **The Mission of Waldorf Education**

The Social Mission of Waldorf Education, Gary Lamb

The Social Mission of Waldorf Schools, Chris Schaefer (on leadtogether)

### **Collaboration**

Collaboration Newsletter, Leadtogether.org

### **Healthy meetings**

Healthy Meetings, Leadtogether.org

### **Leadership and Trust**

*Servant Leadership, Robert Greenleaf*

### **Harmony and Alignment**

*The Child, Teachers and the Community, Jorgen Smit*