Issues raised around governance subsequent to announcement of the appointment of the School Administrator and new Council Chair

This document is a report back to the whole school community on issues raised around the governance relating to the recent appointments of the School Administrator and Council Chair.

It comprises two sections.

Part A (pages 2 to 6) captures the comments received in a table with three columns:
- Column 1 indicates the author
- Column 2 contains the text of their letter
- Column three contains a brief response and/or a reference to more lengthy responses contained in Part B of the document.

Part B (page 7 onwards) is a detailed response to the issues raised. It has numbered paragraphs so that these numbers can be used to refer back to the third column of the table in part A.

My apologies for this complexity, but it avoids repetition in the responses while ensuring that concerns are expressed clearly verbatim and in the context they were raised.

My hope is that you will see this in the spirit it is intended and make your contribution to ensuring that we continually improve our work. Please don't hesitate to contact if you would like to explore any of the issues further.

And once again I encourage anyone who has a passion to contribute to this aspect of voluntary support in our school and would like to look at joining the Council, to please contact me.

Mark
Mark Drewell
Council Chair
mark.drewell@gmail.com

12 November 2015
PART A

In the first column of the table below, the following initials are used below to indicate the writer of the comments/concerns:
M – Michaela O'Sullivan who is Chair of the Parents and Teachers Association and who wrote to Edwina Ratcliffe in her capacity as secretary to the Council (board of trustees)
D – Dave Chapman
A – The comments of two other people who wished to remain anonymous (identified as A1 and A2).

The right hand column provides references to the various sections of a longer response from the Chair which follows the table in Part B.

<table>
<thead>
<tr>
<th>By</th>
<th>Comments/concerns</th>
<th>References to paragraphs in response from Chair (see Part B from page 7)</th>
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<tbody>
<tr>
<td>M</td>
<td><strong>Process for appointment of new business manager</strong></td>
<td>paragraph 1</td>
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<td>I have had a number of parents voicing concerns which I would like to bring to your attention to respond to openly.</td>
<td>paragraphs 2 to 8</td>
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<td>I would firstly like to state that I wish Marcus Link well in his new position, the future of our childrens’ education rest with him and the new school management team and I genuinely wish them huge success. It is encouraging that they have taking on the responsibility.</td>
<td>paragraphs 2 to 8</td>
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<td>In light of the crisis in the finance department and having to restore the parents’ faith in the new structures in place, the concerns being raised are:</td>
<td>paragraph 9</td>
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<td>1. Why was there not an open recruitment process (even if the Marcus was still the successful candidate, a proper process was not seen to be followed)</td>
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<td>2. Who appointed Marcus? If it was the council, then that unfortunately looks clandestine; if the chair of the council is the candidate and part of the selection committee.</td>
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<td>3. Mark Drewell is not listed on the school website as being a council member. Had he resigned and then been reappointed as Chair?</td>
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<td>This is in no way a reflection of the individuals in these roles, but more about the process. I am sure that there is a reasonable explanation as to why these normal procedures may have been bypassed, but perhaps it would be useful if these issues were dealt with openly and the school (Council/management team) could reply to the parents, for example in the Friday Flier. It would be great to have everyone on board and in support of these posts. We all need to pull together as a community. I am bringing this to your attention so that the school is aware and if you feel that it would be helpful to respond publicly then that might be helpful to dispel any misgivings. The school does need to become professional in its actions to restore faith in the organisation as the council had allowed a crisis to develop without seeming to realise the severity of non-payments, reduced pupil numbers and delayed RHI payments. It is my intention that the school is highly regarded and scrupulous in its dealings and I do not want rumblings to undermine the new leadership. I look forward to your reply.</td>
<td>Being done in this document</td>
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<td>I don't doubt the need for capacity within the school at this time. I can also understand that School Council needed to act. However, I am raising concerns about the way in which the action was taken. There remains a need for clarity about why the decision to appoint the last Chair of School Council to the most senior post in the school was made, and whether it is appropriate, and more importantly how the appointment took place.</td>
<td>Paragraphs 2 to 8</td>
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<td>A1</td>
<td>I felt uncomfortable when I heard that Marcus had taken on the role of SA. The school has found itself in difficulty on many an occasion by simply taking the person who offers first. I reserve judgement as to whether Marcus is really the right person for this role. My personal opinion is that a review should take place of the governance and management</td>
<td>Paragraphs 2 to 8</td>
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<td>of the school in light of the current situation we find ourselves in, and that this should be undertaken by someone outside the school community, a consultant or mentor. I have been doing some research and found a couple of leads on this. I can share them with you if you are interested. Other ideas have been to approach other schools to ask for mentoring. Council and school management need to show some accountability/responsibility for this situation in order for trust to be rebuilt with the parent body. I don’t know how trust will be regained otherwise.</td>
<td>Paragraph 14</td>
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<td>I have wider concerns about the fact that there are very few Council members and I wonder if, as a governing body, you have the necessary skills to guide us through this challenging time. I would like to see the Council actively recruiting new members. I find it disturbing to learn that two new Council members resigned last year because they were not happy with how things were being conducted.</td>
<td>Paragraphs 11-16 address the rest of the comments from here onwards in this letter</td>
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<td>This one particularly caught my eye and I have already mentioned it to Marcus: <a href="http://www.thefsi.org/training/london-november-2015/trustee-roles-responsibilities/">http://www.thefsi.org/training/london-november-2015/trustee-roles-responsibilities/</a> and this one on the same day: <a href="http://www.thefsi.org/training/london-november-2015/recruiting-retaining-trustees/">http://www.thefsi.org/training/london-november-2015/recruiting-retaining-trustees/</a> Please do consider attending, if only to make connections with what seems like a valuable organisation and show that you consider your role in the governance of the school seriously and are willing to admit that you may learn something new! I understand from a question raised at last June’s AGM that as a Council you stated that you would attend courses where necessary. This seems like a good opportunity to show that you are taking that request seriously and that you are committed to conducting business in a professional way. This is also on offer early next year: <a href="http://www.thefsi.org/services/conferences/skills-conference/">http://www.thefsi.org/services/conferences/skills-conference/</a> I am sorry if it feels that I am trying to teach you to suck eggs. I am trying to remain positive and supportive of the school, it feels like professionalism is required at all levels right now. Right now I would find it hard to recommend the school to new parents. Governance is just one area of concern. I do hope that the school can shake off the “Steiner schools are all badly managed” image and pull through this major challenge with the children’s best interests at heart.</td>
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| A2   | Dear Management Team,  
I am moved to write to you as I really don't know where to address my concerns. I read about the appointment of Marcus to the post of School Administrator with such disappointment. This is absolutely no reflection on Marcus's skills or capabilities, but disappointment that the post was not filled through a recruitment process allowing all parents at the school with the appropriate skills to have an equal chance at, what is after all, the highest paid post in the school. From the outside this looks like a case of nepotism, 'jobs for the boys' and the complete antithesis of the promises of clarity and transparency made at the last school meeting. It is so damaging to our perception of how the school is run, by whom, and for whom.  
I also want the school to know that many people feel the same way, but many decide to talk amongst themselves rather than raise it with the school, for feel of putting themselves in the firing line. I feel that if I don't say anything I shall be eaten up by my feelings of anger and end up removing both my children from the school. I really cannot feel confident that the school can steer itself safely through the current financial storm if it cannot even manage a staff appointment in a professional and transparent manner. For if jobs cannot be offered fairly, then how can I feel assured that all people will be judged equally and fairly in terms of administering the new bursary funds, or being asked to pay up unpaid bills, or to leave the school, or indeed whether special arrangements are still being made for 'special' families. Perhaps it would be better if Marcus held the post for an interim period, so that it can be advertised and he can complete fairly and squarely with other qualified and skilled individuals within the parent body or externally. I would also like more clarification of the work he has done 'turning round two anthroposophical organisations' as quoted in the Friday Flyer of the 6 November. The rumour mill reports something quite different. | Paragraphs 2-8                                                                                                                                 |
|      |                                                                                                                                                                                                             | Covered in the announcement last week - earlier announcement that this is indeed a fixed term role for 12 months |
PART B

Response from the Council Chair

The various sections below are numbered so that they can be cross-referenced in the table above. This process avoids repetition of answers.

1. Support from the parents for Marcus and the management team is essential if they are to be effective and it is really encouraging to note that all comments we have received recognise the importance of this.

2. During the course of the summer, Council reached the decision that we would not be able to bring the school successfully through its current administrative and financial challenges by just re-appointing the then Senior Administrator for an additional contract after his then one year contract was completed.

3. In our discussions we concluded it would make no sense to consider the idea of an employment post in the way that would have been possible under organisational “business-as-usual” circumstances. We recognised that we were in a crisis where what was needed was not a person to do a pre-defined job, but rather an act of executive leadership which would pull together and resolve many strands of short-and long-term issues. Elements of our analysis included:
   - Recognising that in his then capacity as Council Chair, Marcus Link had already taken on many aspects of the work required but that this voluntary solution was also insufficient in that there was a limit to what anyone can provide in a voluntary capacity unless they have the luxury of not needing to earn an income and because part of what needed to be done was a day-to-day line leadership role for the administration team.
   - We recognised also that the executive leadership task was to sort out and create a system which it would then be possible to imagine advertising for someone to lead in a defined role (if indeed that is what will be required once our current issues have been resolved).
   - Seeking to recruit someone external into the current situation was not an option. For the above reasons it would be practically impossible and because the timescales for action are now and in our view any outside person would have to spend too long working out what was happening before they could be effective.
4. With this in mind we also recognised as Council that we had in our view a good solution to our predicament if Marcus would be willing to take on the task in a professional capacity on a short-term consulting/operational leadership contract.

5. The initial discussions around this possibility took place between the other Council members and did not involve Marcus. Once the other members of Council (i.e. excluding Marcus) had concluded that this would be a good option, we approached him to see if he would be willing to consider this so that we had it as a real possibility rather than just an idea. He confirmed that he would.

6. The council members excluding Marcus also considered whether there was anyone else in the community within the school (including employees) who could be an alternative to take on the task that in our view needed doing. We concluded that in our view this was not the case.

7. Having considered the various choices and recognising that we had found a potentially effective solution to the crisis we faced, our next step was to consider what other consultation was appropriate. It was our view that while the responsibility for such a contract rested with Council, before we acted, we should hear the views of College.

8. We therefore prepared a briefing document for College members and invited them to a joint meeting with Council. Together we reviewed the proposal with another member of Council taking the chairing role, not Marcus. Participants in the meeting were then afforded an opportunity to discuss the plan in detail and to ask questions of Marcus. This was a robust interview process with many excellent questions and comments being put to both Marcus and to Council by College members. Thereafter Marcus was asked to leave the meeting so that the two bodies could discuss the matter further without his presence. The governance process issues raised in the various parents letters that have lead to this feedback all came up in the discussions and were carefully considered. The conclusion of the meeting was that College supported the action Council was proposing to take and requested that the announcement be made to the wider school community as joint announcement between Council and College to give a clear signal of that support. It was my sense that College, as Council had also done, recognised the proposed way forward as an excellent solution to a complex problem.

9. Having agreed on the action, Marcus Link immediately tendered his resignation from Council, which Council accepted. Council then asked me (Mark Drewell) if would take on the role of Chair of Council and I agreed to do so.
One of the issues raised was a perception that I had resigned from Council in the summer: so, how come I was now its Chair? The facts are that during the summer I indeed faced a personal ethical issue of whether to continue as a member of Council. This was because it looked like we as a family would not be able to keep our children at school for financial reasons and I did not feel it was appropriate for me to continue in a governance role under such circumstances. Accordingly, I had tendered my resignation from Council. While this was under consideration by Council our family financial position improved to the point we could meet our obligations to the school making an arrangement that is within the framework of combining a commitment to pay full fees with an element of deferral. Accordingly I withdrew my resignation, which had not in any case been formally accepted by Council. In the period while this was unfolding, the new website was being built and a catch was dropped in assuming that the interregnum would become the ongoing reality so I was not listed on the new website. This is now being rectified.

10. What about Marcus’ track record? In the announcement of his appointment we referenced his work in two anthroposophical organisations. Here is some detail:

**Crossfields Institute**

He joined Crossfields Institute as Director of Communications and member of the Executive Group to create a communications department for the organisation to serve its wholly owned subsidiary Crossfields International, its schools, centres and affiliates. The role included responsibility for the brand and sub-brands, public relations, marketing and communications as well as web infrastructure and websites of all affiliated organisations, as well as oversight of and development of the Institute’s virtual learning environment (VLE).

The role quickly developed into that of a Business Developer. In his work there he led the creation of the Communications Department, the design and development of seven website projects and was able to develop the image of the Institute away from that of an educational charity to that of a “research institute for social innovation”. Also, his positioning of its three main activities – further education as an awarding organisation, higher education as a higher education institute and organisational development projects as a consultancy – were instrumental in the staffs’ self-understanding of its role and function. He also led fundraising programmes and sales campaigns. His design and presentation of the VLA for the Institute’s latest global MA programme developed in cooperation with Al anus University in Germany played a key part in the approval of the programme by the German accreditation authorities.
Anthroposophical Society in Great Britain (Charity Group)

Marcus was Honorary Treasurer, trustee and director for the charity group Anthroposophical Society in Great Britain including Anthroposophical Association Ltd and Rudolf Steiner Press Ltd, headquartered at Rudolf Steiner House on Park Road near Regents Park in London. The ASinGB is a membership society with some 2,000 members. It promotes the works of the late Dr Rudolf Steiner. In his time with the ASinGB he oversaw a complex change management process as well as an organisational restructure and the deconsolidation of Rudolf Steiner Press into a separate company. The finances of the ASinGB had become increasingly difficult for its members to understand and his work was initially focused on disentangling the aspects of running and maintaining Rudolf Steiner House with its café, bookshop, library, theatre and lecture rooms for hire from the Society’s affairs in order to understand the basis of its deficit. His success in connecting the aspirations of the membership with a perspective on the finances as “the human face of the money” which was accessible led to steep increases in membership contributions. He also co-lead the project which established the International Concert Series at Rudolf Steiner House.

Perhaps more importantly as Council we had already seen him make a tremendous contribution in a voluntary role and were clear that he was and is the right person for the task. One colleague described it as a real gift that has come to us and we are extremely fortunate.

11. On a broader front the question is asked was Council aware about the many issues that lead to the crisis? My response is, yes, we were and that is why we acted to change the management system, were catalytic in the restructuring which included the reinstatement of a College, the formation of a three person executive group (the School Management Team), the initiation of a number of processes to re-engage the parent body and the recruitment of a Senior Administrator. We recognise that with the power of hindsight, it is clear that we could have been more effective. We continue to work on this and to also seek to expand the wisdom we have. Finding trustees for any organisation is easy when things are going well but people willing to come on board in more challenging times are less evident. We encourage people with the interest and skills to do so. As a side comment I don not think that Council is short of skills in understanding finance. Our challenge has been to establish a mechanism in the school, which could deliver effective financial information built on effective financial management processes. This has now been addressed.

12. On my own experience and skills as a trustee and chair, I will be delighted to find ways to improve. I am however not a novice. This is the fourth organisation I have chaired. The other three are:
- An environmental NGO based in Johannesburg for 6 years (www.ewt.org.za)
- A global leadership initiative based in Brussels for 2 years (www.grli.org)
A large child rights NGO based in Stockholm for 3 years (www.worldschildrensprize.org)

I have also served as a trustee in several other organisations including a Steiner School in South Africa in which we successfully initiated a process to open a high school.

In each one, I have discovered new dimensions of what is a complex process and role. This is my first experience of chairing within the interesting logic of the UK system around charities. There are nuances to learn and a level of box ticking and covering one’s proverbial that from my global experience seems to be more about being able to hide behind rules than it is about being accountable. However I am excited to learn and welcome all opportunities to do so. I will look into the possibilities identified by writer A1 above and explore others as they arise.

13. In my experience I have found many well run Waldorf Schools and so am looking to playing my part in helping us to be a positive model for those who seek them. Any pioneering system that works against the tide of the mainstream will always find itself under fire and that is part of our challenge in addition to making things work well.

14. The idea of some kind of external review will be looked at by Council and reported on to the wider community through our meeting minutes which are published on the school website.

15. I am not aware of the resignations that are referred to. We had one trustee resign last year. As always such events are more complex than a sound bite can address and multiple perspectives on why something happens abound. It would also be inappropriate for me to go into the details especially when that person is no longer part of our school community.

16. The point that we do expect Council members to have an anthroposophical understanding is because we are a Waldorf School. This is the foundation of our education. It is why we exist. In practice that requirement is very flexible in that anyone who has a child at the school is likely to qualify.