



# THE PATH AHEAD

Building. *Stretching.* Growing.



Waldorf School  
at Moraine Farm



SHEFFIELD  
POTTERY, INC.

## *Dear Community and Friends,*

Our 2013-2014 year was a year of fortifying our school, planning for our future in order to move forward with renewed energy and potential. The Board and College continued to work together to finalize the new Five-Year Strategic Plan, Our Path Forward. The Strategic Plan identifies the actions and investment required to make our school a stronger and more sustainable institution. It asks us to take action collectively to achieve greater financial stability, and to create an even more deeply enriching and diverse educational experience for all of our students.

As the Strategic Plan was being finalized, our school was simultaneously working to achieve one of its major goals—accreditation. Seeking accreditation with the Association of Independent Schools of New England (AISNE) and re-accreditation with the Association of Waldorf Schools of North America (AWSNA) was an ambitious undertaking calling for an intensive and focused process of self-study. Our deepest gratitude goes out to the Faculty, who dedicated so many hours to this worthy task of self-assessment. Their work has benefitted this school in a multitude of ways.

During this time, another exercise in self-analysis was taking place—an evaluation of

The current Strategic Plan, Our Path Forward, is truly that — a well thought out, thoroughly researched roadmap for moving our school into the future. The Plan identifies the actions and investments required to make our school a stronger and more sustainable institution over the long term. The Strategic Plan has been endorsed by the Board of Trustees and the College. Many of the action items outlined are already in process or have been completed.

our school's name. Through all-community meetings, online surveys and discussions with groups of parents, teachers, alumni, friends and supporters of our school, we recognized a change of name as an opportunity to reaffirm our mission and redefine our identity as a community. As a result, Waldorf School at Moraine Farm was introduced.

As is often the case, it is the journey that is as important as reaching the destination. Through each of these major endeavors—finalizing a strategic plan, undertaking the work of accreditation and considering our identity through the name evaluation process—we seized opportunities to strengthen relationships and create a common vision. The Board and College came together to review critical governance issues and the school benefited from the different perspectives each brought to the discussion. These discussions, in turn, sparked several important new initiatives,

such as the formation of the Tuition Review Task Force.

On a final note, it is important to acknowledge the important grant we were able to secure that allowed us to put so many elements of our Strategic Plan into action. In addition to supporting curriculum and program enhancements, this grant recognized the critical role of the faculty through the implementation of a more competitive salary structure.

Overall, 2013-2014 was a critical year, one marked with many accomplishments. Our school is stronger, on a more secure foundation, and has a clear path for moving forward with intention and a determined focus.

*Susan White*

Susan White  
Administrator

*Cathy Kennedy*

Cathy Kennedy  
Chair of the Board



# Waldorf School at Moraine Farm



## *Moving Forward*

The 2013-2014 fiscal year was a year marked by intense focus and steady concentration on implementing the Strategic Plan.

We are building a solid foundation that will support the positive future growth of our school. The most public and notable development, of course, has been changing the school's name from Cape Ann Waldorf School to Waldorf School at Moraine Farm. Yet the new name is only the beginning of the story about the important strides forward we have made this year. We have been extremely proud to launch the new name, Waldorf School at Moraine Farm, along with the new logo. This was a key decision arrived at after a great deal of careful thought, analysis and discussion that, in many ways, brought this community closer together through the close examination of our mission, goals and vision for the future.

The name Waldorf School at Moraine Farm stands as a symbol of this community's deep ties to our permanent home on Moraine Farm, of the wonderful partnerships we're nurturing with our non-profit neighbors, and of our expansion across the property. Expanding to the Gatehouse is part of a long-term vision to expand our presence on the property. More importantly, it allows us to grow the Early Childhood Program, providing a wonderful environment for these special programs to flourish while also expanding our administrative office space.

Our goals for expansion transcend the boundaries of our physical space and presence on Moraine Farm, however. We are also committed to expanding this community in terms of growing the student population and of broadening the diversity of families who make up the whole. Central to this goal is the work of the Tuition Review Task Force, which has both practical and philosophical implications. Assessing tuition and tuition adjustment models that could help make the education we offer more accessible to families across the economic spectrum is an important objective. It is a goal that underscores the school's progressive approach to education and our commitment to diversity in its many dimensions.





# *Positive Momentum*

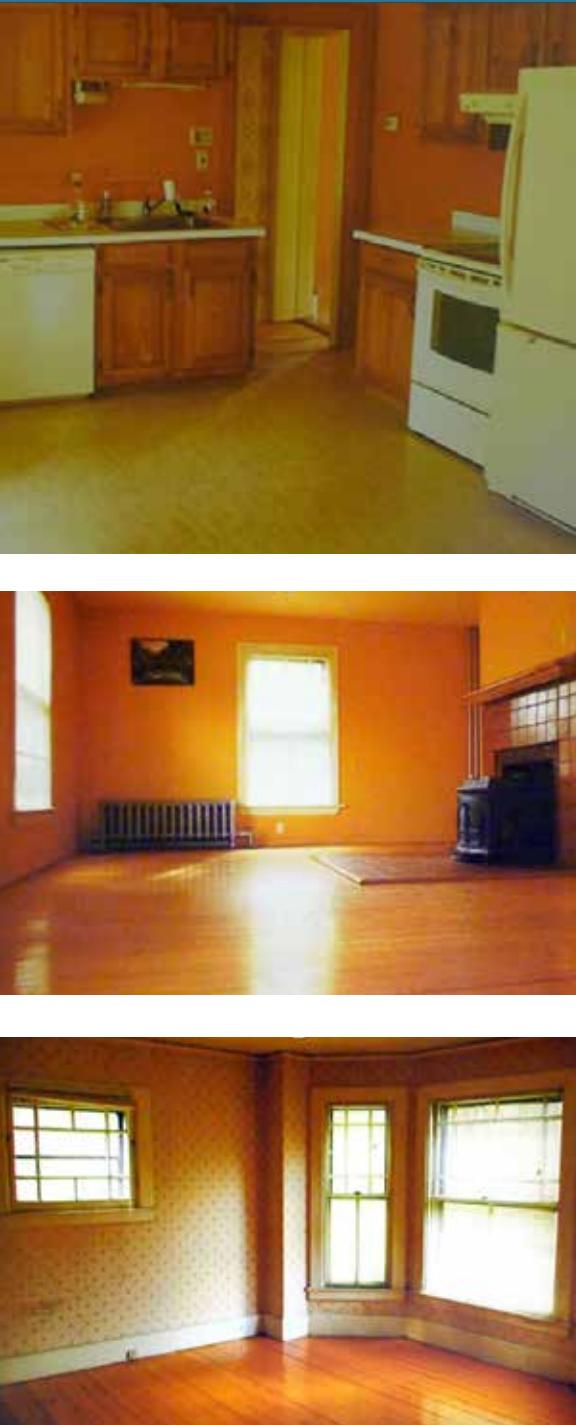
Meeting the demands of the Accreditation Process was a major milestone for the year. The self-analysis that is at the core of this process has helped to fuel much positive growth and change at the school.

We reaffirmed the values and goals this school is committed to, and re-examined who we are as a school and as a community. As a result, we have been able to reinvigorate our mission and communicate clearly the value that this school has to offer. The most overt statement of this renewal is, of course, the new name. Yet this renewal goes so much deeper. We have targeted and continue to investigate opportunities to enhance our programming, and much deep pedagogical work has been undertaken by the faculty.

The Accreditation Process yielded a clear outline of our areas of strength and areas of weakness. As such, it has proved to be foundational to the work going at the school. In addition to the AISNE and AWSNA credentials that this process will result in, we also now have documented benchmarks, clearly articulated curriculum guides and streamlined processes. It has also pointed the way to new programming. Reintroducing the Spanish Program is one such example. Spanish is once again a subject area, and now all students in the grades participate in two language classes. This increased emphasis on language and culture is an important asset to our students' learning, development and worldview.

Not only do we have a more thoroughly documented curriculum, but as a result of the accreditation work, the faculty's ability to bring the curriculum forward has been greatly enhanced. The curriculum benchmarks have strengthened the faculty's ability to ask questions of itself and to shape the curriculum to meet the needs of each class. Waldorf schools are unusual in the fact that the faculty meets for 90 minutes of pedagogical work each week. In five-week blocks the faculty undertakes study and discussion of any number of education themes, with faculty presentations and artistic work. Several times each year, a class study or child study is undertaken, in addition to the standard class study of the rising first grade and eighth grade. As part of this study, the faculty covers all of the ways each child in the class accesses the world and learns. Here we find the heart of the Waldorf Education model in action.





## *Fund in Need*

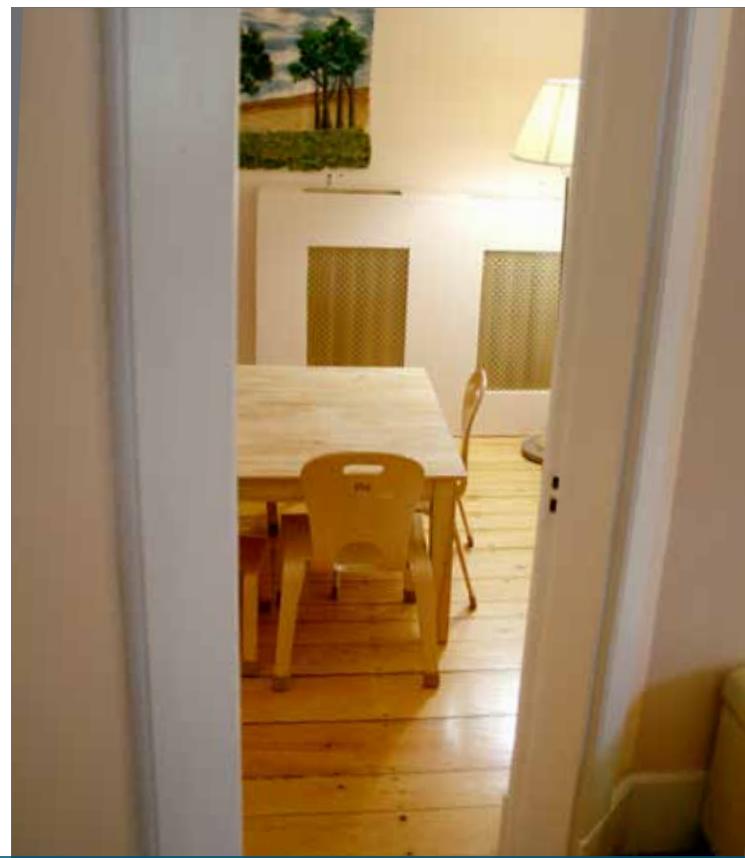
The 2014 Fund-in-Need was focused on raising money for the renovation and lease of the gatehouse at Moraine Farm for use as our Parent & Child Program center. The property owner, Mimi Batchelder, offered us a unique chance to expand our campus. The community stepped up with a generous outpouring of time and funds that enabled us to take advantage of this opportunity.

Prior to this expansion, we had been very limited in our ability to accommodate the demand for Parent & Child classes. With this new, dedicated space, we were able to offer more classes and increase the size of each class. Moving the program off-site also fit with the pedagogical vision for this program — the separate location offers a truly gentle introduction to Waldorf Education. In addition, this expansion also fit with our long-term strategic vision for the school. Our Strategic Plan highlighted growing the Parent & Child Program as an important step in ultimately building enrollment throughout the grades.

Thanks to a generous donor in our community, we were presented with matching funding that met half of our Fund-in-Need goal. We were challenged to raise \$26,000 and that amount was matched in order to meet our total goal of \$52,000. Our thanks to everyone who participated to make this a reality. We would also like to extend our warmest gratitude to Jack Hogan and the Early Childhood Team who worked so tirelessly on renovating and preparing the gatehouse for classes to begin in September of the 2014-2015 school year.

*Left: Before Renovation*

*Right: After Renovation, In Use*



# We are grateful to have so many new and longtime supporters of Waldorf School at Moraine Farm. Thank you all.

We are grateful for the support of so many individuals and organizations who respect the work we are engaged in here at Waldorf School at Moraine Farm. Their gifts in 2014 have resulted in a number of positive strides forward for the School. We would also like to thank the many parents, staff members, faculty and alumni who have generously given their time and attention throughout the year.

## ANNUAL FUND

Anonymous  
Aberdeen Home Care, Inc.  
Daryl Achilles and Meghan Weir  
Craig Akers and Christine Garcia-Akers  
Joshua Anderson and Jessica Day  
Anthony and Janet Ansaldi  
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Mari Yamaguchi  
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Vanya and Christine Yoors

#### FUND-IN-NEED

Anonymous  
Craig Akers and Christine Garcia-Akers  
Harold and Sabrin Babcock  
Christopher and Jennifer Benoit  
Dan Butin  
Chris and Laura Carrigan  
Tony Cheng and Lori Etringer  
Patrick and Dana Dooley  
Charles Walsh and Deborah Dowd  
William Doyle and Stacey Fisher  
Crimi Family Foundation  
Virginia Wellington Cabot Foundation  
Johan Frenje and Jocelyn Schaeffer  
Marc Hazel and Heather Price Hazel  
Jennifer Helmick  
Jay and Kelly Hiselman  
Guy Johnson and Susan White  
James and Catherine Kennedy  
Anne Lucas  
Scott and Gretchen MacKilligan  
Doug McGarrah and Beth Dowd  
Scott and Dianne McGaunn  
Walter and Gayle McGuire  
James and Jennie Meyer  
Calin and Melanie Moldovean  
Rob and Ellen Moore  
Jonathan and Sharon Poore  
Peter and Kerry Pound  
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Mary Seal  
Matt Stella and Jeni Indresano  
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William and Linda Wrinn  
Lee and Heidi Zohn  
Michael Zuercher and Susan Martinson Zuercher

#### SPECIAL PROJECTS

Anita Brewer-Siljeholm  
Heather and Daniel Collis Puro  
Ibrahim El-Hefni Technical Training Foundation

#### CORPORATE GIVING

Abereen Home Care, Inc.  
Dailygood  
Puro's Inc.  
RSF Social Finance  
Target  
Uriel Pharmacy

#### FOUNDATIONS

Crimi Family Foundation  
Eastern Bank Charitable Foundation  
Essex County Community Foundation  
Ibrahim El-Hefni Technical Training Foundation  
Virginia Wellington Cabot Foundation  
Wells Fargo Foundation





## *Financials 2013 - 14*

After three years, Waldorf School at Moraine Farm has set roots in our beautiful, bucolic setting at Moraine Farm. Despite a challenging enrollment climate, the school's overall financial picture is positive, driven by an extraordinary fundraising year which saw the impressive fundraising support of our community bolstered by strategic gifts by individuals and foundations. Although income from tuition and fees declined compared to the previous fiscal year, it was partially offset by growth in aftercare program income.

Academic service expenses held steady while administrative expenses increased due to increased investment in marketing, and the enhancement of other support positions.

The school's net assets increased due to a number of factors, including an uptick in the building value resulting from the addition of the kindergarten and sports cabin, key foundation grants (mentioned above) an increase in our cash position, and continued decline in liabilities as a result of paying down the property mortgage.

- *The Finance Committee: Chris Benoit, Chris Dowley, Kristen Fehlhaber, Marc Hazel, Scott MacKilligan, Anna Scalera, Luciano Sappia.*

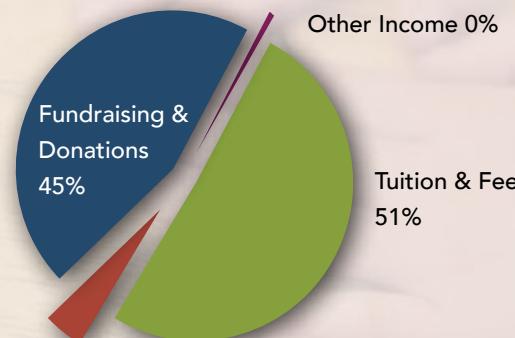
## REVENUE & SUPPORT

	2013-14	2012-13
Tuition and Fees	\$ 1,166,852	\$ 1,301,486
Program Income	\$ 85,508	\$ 66,424
Fundraising and Donations	\$ 1,009,322	\$ 261,278
Other Income	\$ 3,207	\$ 22,211
Total Revenue and Support	\$ 2,264,889	\$ 1,651,399

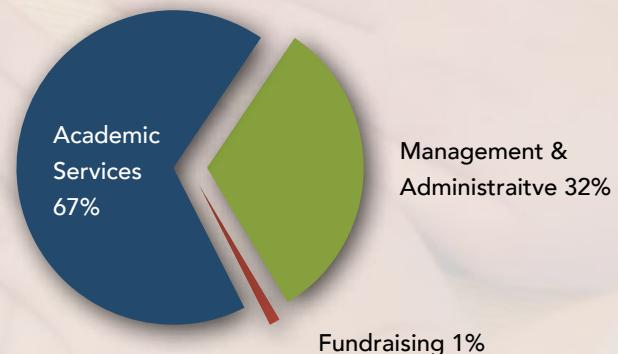
## OPERATING EXPENSES

	2013-14	2012-13
Academic Services	\$ 1,127,995	\$ 1,136,893
Management and Administrative	\$ 538,769	\$ 488,992
Fundraising	\$ 25,578	\$ 52,587
Total Expenses	\$ 1,692,342	\$ 1,678,472
Change in Net Assets	\$ 572,547	(\$ 27,073)
Net Assets, Beg. of Year	\$ 1,886,476	\$ 1,913,549
Net Assets, End of Year	\$ 2,459,023	\$ 1,886,476

## 2013-14 INCOME



## 2013-14 EXPENSES





BALANCE SHEET	2014	2013
Current Assets		
Cash	\$ 1,022,381	\$ 572,727
Other Current Assets	\$ 52,746	\$ 35,867
Total Current Assets	\$ 1,075,127	\$ 608,594
Total Property and Equipment	\$ 3,214,054	\$ 3,137,140
Total Assets	\$ 4,289,181	\$ 3,745,734
Liabilities		
Total Current Liabilities	\$ 192,918	\$ 174,976
Total Long Term Debt	\$ 1,637,240	\$ 1,684,282
Total Liabilities	\$ 1,830,158	\$ 1,859,258
Net Assets		
Unrestricted	\$ 1,715,473	\$ 1,745,770
Temporarily Restricted	\$ 743,550	\$ 140,706
Total Net Assets	\$ 2,459,023	\$ 1,886,476
Total Liabilities and Net Assets	\$ 4,289,181	\$ 3,745,734





# Waldorf School at Moraine Farm

701 Cabot Street, Beverly, MA

978.927.8811

Pre-K through Grade 8

waldorfmoraine.org

The mission of Waldorf School at Moraine Farm is to help students discover and develop their individual capacities so that they can fully engage in the world and contribute meaningfully to society. We aim to cultivate clarity of thinking, compassion and moral strength, and purposeful action in our students.

Our educational approach is founded on the time-tested insights into human development applied by Waldorf schools throughout the world. We integrate a rich, age-appropriate curriculum in the humanities, math, and science with music, visual and practical arts, and movement. We work to make lessons active, filled with imagination, and connected with practical life. We recognize that the heart of education is the relationship between teacher and students, which grows and changes to meet the distinct developmental stages of the child.

Building community is also vital to our mission. Faculty, parents, alumni, and friends collaborate to tend and grow the school, modeling the lifelong learning, fruitful cooperation, and purposeful work we aim to develop in our students.

## BOARD OF TRUSTEES

Cathy Kennedy,  
*Chair*

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Heather Collis Puro  
Jonathan Cosco  
Pam Fantini  
Laura Freysinger  
Dianne McGaunn  
Jonathan Poore  
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