

HOFFECKERBURGESS CONSULTING
REPORT ON SCHOOL VISIT OCTOBER 29-NOVEMBER 2, 2007
WINTERBERRY CHARTER SCHOOL, ANCHORAGE, AK

SUMMARY OF VISIT:

George Hoffercker and Donna Burgess of Hoffercker Burgess Consulting (HBC) were invited to Winterberry Charter School for the week of October 29-November 2 for a “whole school consultation” and follow up to the community retreat which they led in April 2007. During that week, George observed the majority of the school’s teachers in their classrooms and met with teachers individually to share his observations and coaching suggestions. Each teacher whom George observed also received a written report with his comments and recommendations. Donna and George attended meetings of the Faculty, the WPG, and several committees, made an evening presentation to the school community and met with individual members of the office staff, parent body, Board, Faculty and Administration and reviewed many school documents. What follows is a report on observations that we made during our visit and a series of recommendations. These recommendations are made in the spirit of building on the considerable strengths that Winterberry Charter School currently demonstrates and examining ways to enhance the school’s opportunities for continued success as it takes the next steps in its development.

REPORTED/OBSERVED STRENGTHS:

- Faculty members are continuing their commitment to ongoing training in Waldorf education.
- Faculty are receiving financial support from the Administration to continue their training.
- The school “enrichment program” has become a licensed day care provider.
- The Russian language program and the strings program are now carried by Specialty teachers.
- The WPG has received its 501C3 status and is working to define clear fundraising guidelines and goals.
- The school’s bylaws are being updated and revised “to reflect current best policy, procedures and practices” as HBC recommended in April 2007.
- Under the proposed new bylaws, the APC will be expanded and include formal representation from the parent body, Faculty and WPG.
- The Administrative staff has been expanded to include a part-time Business Manager position.
- Space reorganization and recent painting of the walls have contributed to a “bright new look” for the school.
- Enrollment is at 171 children, six more students than the ‘07/’08 budget was based on. As a result, the school will be receiving additional funds from the Anchorage School District.

REPORTED/OBSERVED NEEDS, OPPORTUNITIES AND RECOMMENDATIONS:

GOVERNANCE:

- Under the proposed new bylaws, four new positions will be created on the APC; some current board members may wish to be replaced when their terms expire.

Recommendation: To ensure an orderly and effective expansion of the APC, HBC recommends holding a board development retreat over the winter holiday break or very early in the second school semester. The purpose of this retreat would be to develop a clear set of expectations for incoming board members based on a review of current board values and practices and including desired values, practices, roles and responsibilities going into the future. The school is fortunate to have a skilled facilitator trained in Appreciative Inquiry who has offered to volunteer her time to conduct this retreat (Lisa Gravel).

Recommendation: Once the Board increases in size, establish administrative committees with a Board member as the head of each committee who then attracts other parents or community members to serve with him. Review the scope and membership of the Innovation Teams that were formed at the April community retreat to determine if any of these Teams should metamorphose into administrative committees of the Board. The heads of these committees "report" to the Administrator.

- Current APC minutes are lengthy and record dialogue on many topics as well as detailed discussion that is not related to action items on the agenda.

Recommendation: Minutes of school governance meetings need to comply with standard formatting, reporting on each agenda item according to its purpose, i.e., information only, discussion only or action. If an information item is lengthy or complex, a written report should be presented and attached as an addendum to the minutes. On a discussion only item, rather than recording the details of the discussion, just the topic or the nature of the discussion is recorded. All actions need to be duly noted indicating who made the motion, who seconded the motion and the record of the votes. It is not necessary or advisable to record the dialogue that precedes a discussion or an action. HBC will forward samples of well-formed meeting agendas and minutes to the APC.

FACULTY

- The Faculty currently engages in a "child study" if a teacher requests that her colleague assist her in developing insights about how better to meet the needs of a particular child in her class.

Recommendation: In addition to conducting child studies, HBC recommended to the faculty that they also employ the student support intervention known in California as the SST: "student success team" or "student support team." As described to the Faculty, this format includes the primary teacher, the parents(s), and any additional teachers, family members or professionals who have an interest in participating. It is important to note that this is not considered a Special Education intervention and that the Special Ed or RSP teacher is not required to attend. They may, of course, attend if they have insight into a student's needs that they wish to share. The question of when to hold these meetings is a subject that needs to be discussed and decided upon together by the Faculty and Administrator. HBC supplied the faculty with a suggested format for conducting SST meetings.

- Faculty expressed a need to develop an integrated approach to establishing and supporting common goals for classroom and playground behavior. During a meeting with the Faculty, George and Donna facilitated the beginning of a process to develop a common approach.

Recommendation: HBC recommends that the faculty continue the process begun during the week of October 29 and utilizes the skilled facilitation of Lisa Gravel.

- A number of teachers expressed frustration with the current decision-making process within the Faculty. Two main sources of frustration were identified: continuing dialogue about an issue over a long period of time without coming to a clear decision and "rescinding" decisions that have been made.

Recommendation: We recommend that in Faculty meetings, teachers practice the dialogue/discussion/decision model that HBC reviewed and illustrated.

- Some Faculty members expressed a need for more clarity around expectations for their participation in school-wide events, meetings, and other school related work that falls outside of their classroom

teaching duties.

Recommendation: Just as the individual class teachers strive to meet the needs of individual students while serving the whole class, it is important for the Faculty as a body to care for the health of each individual class while keeping the welfare of the school as a whole in mind. HBC recommends that the Faculty and Administration schedule a meeting time when questions concerning teachers' school-wide responsibilities can be addressed and common expectations can be agreed upon.

WINTERBERRY PARENT GUILD:

- Many parents have shown interest in the WPG this school year and meetings are well attended.

Recommendation: In our view, participation in the Parent Guild has grown to a point where a clear structure for class representation in the WPG would facilitate decision-making and help prepare for expanded WPG representation in the APC. One successful model for designing the structure and function of a parent guild was shared with the current WPG Board for consideration. (See attached SunRidge Parent Council document.)

- Todd Robicheaux, current WPG Board President, expressed a need for a meeting format that could help him to organize meetings more effectively.

Recommendation: Two examples of successful Parent Council meeting formats were shared with Todd for his consideration.

- HBC observed that parents attending the WPG fundraising meeting had many good ideas to share for activities, programs and events that could bring additional funds to the school.

Recommendation: To effectively utilize the ideas, time and energy of Winterberry parents who want to help in raising money for the school, HBC recommends the formation of a Fundraising Committee as a standing committee of the WPG. We recommend that all ideas for fundraisers at the school be submitted to this committee which first screens these proposals for their alignment with the guidelines for fundraisers which have been adopted by the WPG and for potential scheduling or other conflicts. One model that has worked well is to accept proposals for the following school year until May and then those proposals that are being recommended by the committee are brought to the full Board of the WPG for approval. Some schools also create a "window" in the fall for accepting some additional proposals for the current school year which can be approved in November.

FINANCES/ADMINISTRATION:

- The school can expect approximately \$48,000 in additional revenue from the Anchorage School district due to increased enrollment.

Recommendation: HBC recommends that these additional funds be used to hire a full time handwork teacher. We agree with the Administrator that too much of her time is currently being occupied by teaching handwork and that she needs more time to carry out her administrative duties.

- The Administrator expressed a need for greater clarification of the roles of her current office staff.

Recommendation: The Administrator schedule a meeting soon with the Business Manager and Office Manager for the purpose of clarifying roles, responsibilities and job descriptions. HBC recommends that the Administrator makes a request to Lisa Gravel to facilitate this meeting, if she is available and willing.

- HBC had several meetings with the Administrator during which we listened to the needs and questions she expressed and made oral coaching suggestions and recommendations based on our extensive school administration experience. We have followed up with a written report to the Administrator reflecting our observations and recommendations.

SITE:

- In the interest of maintaining a good relationship with the current landlord, one parent recommended that a letter of thanks be sent to Ed for all that he has done for the school.

Recommendation: Many schools that have successful relationships with a landlord have established a formal role of “landlord liaison.” This role is usually filled by someone who is not part of the administration and who is not involved in formal lease negotiations, rather someone who is a good listener and communicator and can hear the landlord’s needs and accurately and fairly represent the school’s needs. If the school chose to create such a volunteer position, the recommended letter of thanks could also be used as an opportunity to introduce this person and their role to the landlord.

Respectfully submitted,

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