

## **“Accessible to All”: The Place between Idealism and Reality**

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In the fall of 2005, the Board of Trustees of the Charlottesville Waldorf School adopted the “Accessible to All” tuition adjustment program developed by Bob Monsen and Mary Roscoe of the Waldorf School of the Peninsula in Los Altos, California. At the time twelve Waldorf Schools on the West Coast had adopted the program. Our school was one of the East Coast schools to do so.

In the ATA process, each family applying for tuition adjustment must complete a financial disclosure form. The family must list all income, savings, assets, and debts, as well as provide copies of its federal income tax returns. The worksheet has the family itemize all of its expenses in a number of categories such as housing, food, and recreation. Often this analysis is very helpful for families because they have never looked at their household expenses in such a way. Families are sometimes surprised to see how much money they spend in certain nonessential areas. The worksheet also asks the family to estimate how much it can contribute to the school for its child’s – or children’s – education. In some cases, the budget exercise helps the family realize that they can and want to contribute more than they previously had thought.

The next major step is a conversation between the applicant family and a team of two trained interviewers or “conversationalists” from the school. These conversationalists are school parents, board members, or administrative staff. No faculty members participate as conversationalists because of the extremely personal and confidential nature of the discussions. In preparing for an ATA conversation, the interviewers each study the financial information packet independently and then go through it together before the conversation takes place. They meditate on the upcoming meeting and on the information they’ve received, striving to be able to deal with each family and their circumstances without prejudice. Each conversationalist invests substantial time preparing for the meeting with the family. ATA is grounded in Steiner’s vision of economic relationships as providing the possibility of true understanding and respect between human beings. The interview is seen as a rare and valuable opportunity for individuals to meet and come to know each other’s dreams, hopes, needs, and resources.

The conversation is based on two assumptions: the child will be enrolled in the school and the family will help support the school according to its ability. A third assumption is that both parties – the school and the family – will stretch to meet the needs of the

other. In the conversation, the school's representatives present the school's budget, operating costs, priorities, and plans for the future. They ask about the parents' values, their aspirations for their children, their feelings toward the school, and possible ways of contributing to the life of the school.

In the interview, the school's representatives tell the family what the suggested tuition is. Both parties try to reach a consensus on the family's tuition contribution, based on the family's resources and the needs of the school. Though finances will not prevent participation in the school, each family should contribute as much as they can to the school's operating costs. Some families contribute the suggested amount, some less, some more. The conversations and their outcomes are strictly confidential. Only families asking for tuition adjustment go through the ATA process. But all families in the school are informed about ATA and how it works. Families with substantial resources may offer to pay more than the suggested tuition through annual giving.

At the Charlottesville Waldorf School, the decision to explore the ATA program was made in the fall of 2004. Alice Gore, a long time parent and Board member, had researched the program and brought it to the Board of Trustees for consideration. Understanding that such a program could only be effective with the full support of the school community, the Board decided to bring Bob Mosen to Virginia in the spring of 2005. Many school families and faculty members attended his presentations. During his second visit, Mosen started a training session for the conversationalists and also held another introductory presentation that was attended by more parents from the school. In the end, 12 people actually went through the training.

Bob Mosen was impressed that a school of only 110 or so families could yield 12 volunteers willing to do the training and take on the responsibilities of participating in conversations with families. After the first year, eight more volunteers became conversationalists.

The training is a rigorous one. The volunteer conversationalists work together extensively to prepare for the coming conversations. They are given written material to study, including sample worksheets showing a fictional family's financial situation. They do role-playing, taking turns pretending to be members of the interviewing team and interviewed parents. This process involves exploring the various attitudes and emotions that parents bring to conversations that concern their children's education and their family finances. Then the volunteers attend actual conversations led by an experienced team. Finally they are paired with veteran conversationalists in actual interviews with parents.

“Bob doesn’t give black and white answers. He stresses that there’s no cookbook for this type of work,” says Lisa Torres, a school parent, member of the Board, and chairperson of the CWS ATA Committee. She describes the training as learning to engage in a conversation out of one’s higher self. The conversation itself is an opportunity to help guide families to an understanding both of the needs of the school and of the social impulse of the ATA program. It is also a chance for the conversationalists and families to get to know one another, share their love for the children, and express gratitude to the school.

In the spring of 2006, the first volunteer teams at our school were ready. Their intention was to have an ATA conversation with each family applying for a tuition adjustment and a conversation regarding development – as part of the annual giving campaign – with all of the school’s families. IN this initial year, however, they focused on meeting with the families that had applied for tuition adjustment.

During the 2006-2007 school year, the conversationalists did meet with some full-paying families, since it is important that all families in the school feel that they are part of the ATA program. Meeting with these families has allowed the conversationalists to present the current situation of the school, specifically its budget and finances. It has also been an opportunity to create and too strengthen community. Many families heard, for the first time, details of the school’s financial situation.

The ATA program has definitely been a success in terms of the school’s finances. In the almost three years the school has used this approach, the average contribution per family for tuition and fees has increased appreciably.

The ATA program has also been, in some respects, a “social success.” During the first year of its implementation a more relaxed and positive atmosphere was palpable at the school. More volunteers came forward, with smiling faces and a strong willingness to help with the myriad tasks of school life, such as serving as class parents, driving children on class outings, and taking roles of responsibility in the school fair and the annual fund drive.

At the same time there have been some rough spots. Despite the enthusiasm of the ATA volunteers and the efforts to fully educate the school community regarding the ATA program, a few basic misunderstandings arose and circulated. One myth was that “accessible to all” meant that it is possible to enroll a child and not pay anything. This, in fact, is not possible, since every family must contribute something to the finances of the school. Another misconception was that to enroll an additional child in the school involves no additional cost to the family. Every effort is made to accommodate families

with more than one child in the school, but this accommodation requires even greater commitment and additional sacrifice on both sides.

The interview/conversation process itself involved challenges. On the one hand, the conversations were very rewarding for the individuals involved and helpful for the social relations within the school. As one volunteer reflected, "Of all the things I've done for the school, this has been the most meaningful. I'm constantly amazed and humbled by the fact that we sit down and have conscious, insightful, and meaningful conversations about one of the hardest things to talk about in this country: money." However, the conversations typically last between an hour and an hour and a half and involve an offering of energy and time from both the applicant family and the interviewers.

The CWS Board of Trustees initially committed the school to a three year trial with the "Accessible to All" program. At that time, no one could foresee whether or not the program would work and what it would mean for the school. But there have been definite benefits. Most importantly, every child who has wanted to enroll in the school has been able to do so. The 2008-2009 school year is the third year of that commitment, and everyone acknowledges that there is work to do if the ATA program is to be continued beyond the end of the year. A committee has been formed to review the process from its inception to its current implementation at the school.

It is already apparent that there needs to be ongoing and clear education about the program in the school community. To this end articles about ATA appear regularly in the school newsletter, and the ATA committee periodically holds educational evenings. Those parents who understand the program, who support the social impulse behind it, and know how it works in practice, are engaged in an informal, "parking lot" campaign to counteract misunderstandings and to highlight mutual benefits to the school and its families. In addition, the CWS Board of Trustees brought Bob Monsen back to the school in the spring of 2008 for additional community education and training of conversationalists.

It is important that everyone knows the financial realities of the school and is committed to working together to make the ATA program work. As Lisa Torres expressed it, "It's now time to reevaluate the presentation of the budget and how it's explained to the parents. The school has been carrying a deficit for the past couple of years. We need to acknowledge this as a real concern and a challenge, and make sure we don't sugar-coat it. We need to allow everyone [in the school] to own this deficit.

We're all responsible for holding the school....We need to emphasize what each one of us can do."

In the future, discussions of the school budget with parents will include a full explanation of the varied and demanding work of the teachers and of the real cost per child of running the school. ATA will be presented not only as a tuition program but as an opportunity for community building. In their annual conversation with the school, parents will be asked to consider, for example, what they and their children gained from their previous year's experience. It is hoped that an awareness of the value of what the school brings will motivate families to support the school, financially and in other ways, as much as they can.

One particularly difficult challenge is with families who may be able to contribute more to the school than they do, either from their own income or from other sources of funding. In such cases, the conversationalists have to exercise a refined capacity to discern when a family is truly giving as much as possible. The challenge of motivating and inspiring families to give to their capacity is relevant both to families with limited resources and families who could easily contribute more through annual giving. The conversationalists know that ultimately they may have to risk turning away families.

The ATA program creates a unique social experiment. It gives individuals an opportunity to rise above egotism and self-interest, to distinguish between needs and desires, to view the common good – mutual reciprocity – as primary, and to create a genuine "shared world," a true community.