

# **Establishing a Tuition-Free Waldorf High School in Rural Nova Scotia**

## **A Proposal for Transformative Education and Sustainability**

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**Submitted by: Stella Maris: An Association of Friends of Steiner-Waldorf Education**

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# Executive Summary

This proposal outlines a visionary plan to establish a tuition-free Waldorf High School on a 300-400 acre property in rural Nova Scotia. The school will provide accessible, transformative education rooted in Waldorf pedagogy while achieving financial sustainability through an innovative combination of endowment income, boarding fees, and a biodynamic vineyard social enterprise.

## Key Highlights of the Proposal:

- **Mission and Vision:** Foster creativity, resilience, and holistic growth in students, integrating academic, artistic, and practical learning while removing financial barriers for families.
- **Financial Plan:** Secure an initial capital investment of \$9.36 million for property purchase and renovations, complemented by a \$26.1 million endowment fund to sustain annual operations.
- **Sustainability and Innovation:** Develop a biodynamic vineyard to generate annual revenue through bespoke wine production, incorporating environmental stewardship into the school's ethos.
- **Phased Fundraising Strategy:** A three-phase approach to raising \$26.1 million, combining major gifts, grants, community campaigns, and recurring contributions.

This initiative represents an innovative model for accessible education, sustainability, and community engagement. We invite donors, partners, and stakeholders to join us in bringing this vision to life and shaping the future of education in Nova Scotia.

## Formal Proposal: Establishing a Tuition-Free Waldorf High School in Rural Nova Scotia

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### Mission Statement

Our mission is to provide a transformative Waldorf education to high school students in rural Nova Scotia, fostering creativity, resilience, and a deep connection to the natural world. Rooted in the Waldorf educational philosophy, we aim to nurture the development of each student's head, heart, and hands, integrating intellectual growth, emotional balance, and practical skills. This tuition-free initiative will remove financial barriers for families, ensuring that this unique educational experience is accessible to all, regardless of economic means.

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### Vision Statement

We envision a thriving Waldorf high school community that:

- Empowers students to become self-reliant, socially conscious individuals.
  - Cultivates a holistic educational environment that integrates academics, the arts, and practical life skills.
  - Leverages sustainable practices, including a biodynamic vineyard social enterprise, to achieve long-term financial and ecological sustainability.
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### Project Overview

This initiative seeks to establish a tuition-free Waldorf High School on a 300-400 acre property in rural Nova Scotia. The school will:

1. **Prioritize Accessibility:** Operate tuition-free to eliminate financial barriers for families.
2. **Maintain Financial Sustainability:** Use an endowment fund and social enterprise revenues to cover operating costs.
3. **Offer Boarding Options:** Provide a boarding program for local and international students, supported by associated fees.
4. **Embrace Sustainability:** Partner with a local biodynamic vineyard to produce bespoke wine, integrating environmental stewardship into the curriculum and financial model.

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## Financial Plan

### 1. Capital Requirements

- **Property Purchase:** \$3,750,000
- **Legal, Land Transfer Fees, and Incidental Costs:** \$112,500
- **Renovations and Initial Setup:** \$5,000,000
- **Contingency Fund (10% of renovation costs):** \$500,000
- **Total Initial Capital Requirement: \$9,362,500**

### 2. Annual Operating Costs

- **Staff Salaries and Benefits:** \$819,000
- **Utilities, Insurance, and Maintenance:** \$225,000
- **Boarding Operations:** \$402,000
- **Total Annual Operating Costs: \$1,446,000**

### 3. Endowment Fund Goals

- **Target Endowment Principal:** \$26,100,000 (to generate \$1,044,000 annually at 4% withdrawal rate)
- **Phased Fundraising Targets:**
  - Phase 1: \$10,000,000 (Years 1–2)
  - Phase 2: \$15,000,000 (Years 3–5)
  - Phase 3: \$11,100,000 (Years 6–10)

**Endowment Management:** To ensure long-term sustainability and accountability, the endowment will be professionally managed by a trusted financial institution with expertise in sustainable investment strategies. The fund will follow a disciplined withdrawal policy, limiting annual draws to 4% of the principal to preserve its growth potential. Regular audits and transparent reporting to stakeholders will guarantee fiscal responsibility. A dedicated endowment oversight committee, including board members and financial advisors, will review performance annually and recommend adjustments as needed to align with market conditions and school priorities.

- **Target Endowment Principal:** \$26,100,000 (to generate \$1,044,000 annually at 4% withdrawal rate)
- **Phased Fundraising Targets:**
  - Phase 1: \$10,000,000 (Years 1–2)
  - Phase 2: \$15,000,000 (Years 3–5)
  - Phase 3: \$11,100,000 (Years 6–10)

## 4. Revenue from Social Enterprise

- **Vineyard Operations:**

- 6 acres of champagne-style grapes yielding approximately 10,500 bottles annually.
- Wholesale Revenue: \$210,000
- Production Costs: \$84,000
- Net Revenue: \$126,000

**Potential Risks and Mitigation Strategies:**

- **Risk:** Weather-related challenges impacting grape yields.
  - **Mitigation:** Implement advanced weather monitoring systems and invest in frost protection and irrigation infrastructure.
  - **Risk:** Market fluctuations affecting wine prices.
  - **Mitigation:** Diversify revenue streams by exploring additional biodynamic products such as honey or herbs.
  - **Risk:** Dependency on a single partner for wine production.
  - **Mitigation:** Establish agreements with multiple biodynamic vineyards to ensure flexibility and scalability.
  - **Risk:** Initial capital investment for vineyard setup may exceed projections.
  - **Mitigation:** Build a contingency fund within the social enterprise budget and seek grants specific to sustainable agriculture.
  - **Vineyard Operations:**
  - 6 acres of champagne-style grapes yielding approximately 10,500 bottles annually.
  - Wholesale Revenue: \$210,000
  - Production Costs: \$84,000
  - Net Revenue: \$126,000
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## Phased Fundraising Strategy

### Phase 1: Launch and Foundation Building (Year 1–2)

**Goal:** Raise \$10 million to cover property acquisition, renovations, and initial operations.

- **Major Gift Campaign:** Identify prospective donors through the Waldorf alumni network, local community leaders, and environmentally aligned philanthropists. Develop personalized outreach strategies that emphasize the unique aspects of the school's mission and vision, such as the tuition-free model and sustainability initiatives. Host exclusive events to engage these individuals and provide naming opportunities for key facilities.
- **Foundations and Grants:** Target educational and sustainability-focused grants from organizations that support innovative models of education and rural development. Prepare comprehensive proposals highlighting the school's impact.
- **Community Campaign:** Engage the global Waldorf network through crowdfunding campaigns and awareness initiatives, including social media storytelling and virtual events.
- **Corporate Sponsorships:** Partner with biodynamic businesses and eco-friendly brands that share the school's values. Offer branding opportunities and co-hosted events to strengthen these

partnerships. **Goal:** Raise \$10 million to cover property acquisition, renovations, and initial operations.

- Major Gift Campaign: Secure high-net-worth donors.
- Foundations and Grants: Target educational and sustainability-focused grants.
- Community Campaign: Engage the global Waldorf network.
- Corporate Sponsorships: Partner with biodynamic businesses.

## **Phase 2: Endowment Development (Year 3–5)**

**Goal:** Build an additional \$15 million for the endowment.

- Recurring Donations: Establish a “Founders’ Circle” for multi-year pledges.
- Wine-Based Fundraising: Use early vineyard yields for exclusive donor events.
- Boarding Revenue: Begin fee collection from boarding families.

## **Phase 3: Sustained Growth and Social Enterprise Expansion (Year 6–10)**

**Goal:** Achieve full endowment target of \$26.1 million.

- Social Enterprise Growth: Expand vineyard operations and explore complementary products.
- Legacy Giving: Launch a planned giving program.
- Annual Fundraising Events: Host galas and symposia to engage donors.

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## **Conclusion**

This tuition-free Waldorf High School in rural Nova Scotia represents an innovative approach to education and financial sustainability. By integrating an endowment fund, boarding revenues, and a biodynamic social enterprise, this school will serve as a model for accessibility and ecological responsibility in education.

We invite donors and partners to take the next step by reaching out to our development team. Whether through a major gift, joining our "Founders' Circle," or participating in a naming opportunity, your contribution will directly shape the future of education in Nova Scotia. Contact us today to explore how you can make a lasting impact.

We invite you to join us in making this vision a reality. Together, we can create a school that nurtures students, supports families, and inspires communities for generations to come.





## 1. Capital Requirements

### a. Property Purchase

- **Purchase Price:** \$3,750,000
- **\*\*Legal and Land Transfer Fees:\*\***
  - *Legal Fees:* Typically range from 0.5% to 1% of the property value.
    - Calculation:  $\$3,750,000 \times 1\% = \$37,500$
  - *Land Transfer Tax:* In Nova Scotia, the deed transfer tax varies by municipality but is commonly around 1.5%.
    - Calculation:  $\$3,750,000 \times 1.5\% = \$56,250$
  - *Total Legal and Transfer Fees:*  $\$37,500 + \$56,250 = \$93,750$
- **Incidental Costs:** Estimated at 0.5% of property value for inspections, appraisals, etc.
  - Calculation:  $\$3,750,000 \times 0.5\% = \$18,750$
- **\*\*Total Property Acquisition Cost:\*\***
  - Calculation:  $\$3,750,000 + \$93,750 + \$18,750 = \$3,862,500$

### b. Renovations and Initial Setup

- **Renovation and Construction:** \$5,000,000 (for bathrooms, science and practical arts building, boarding facilities)
- **Initial Furniture and Equipment:** Included in the above estimate
- **Contingency Fund:** Typically 10% of renovation costs
  - Calculation:  $\$5,000,000 \times 10\% = \$500,000$
- **\*\*Total Renovation and Setup Cost:\*\***
  - Calculation:  $\$5,000,000 + \$500,000 = \$5,500,000$

### c. Total Initial Capital Requirement

- **\*\*Total Capital Needed:\*\***
  - Calculation:  $\$3,862,500$  (Property Acquisition) +  $\$5,500,000$  (Renovations and Setup) =  $\$9,362,500$

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## 2. Annual Operating Costs

### a. Salaries and Benefits

- **\*\*Staffing Plan:\*\***
  - 8 Full-Time Teachers:
    - Average Salary: \$52,500 (midpoint of \$45,000–\$60,000)
    - Calculation:  $8 \times \$52,500 = \$420,000$
  - 3 Full-Time Administrators:
    - Average Salary: \$52,500
    - Calculation:  $3 \times \$52,500 = \$157,500$
  - 2 Full-Time Maintenance/Agricultural Staff:
    - Average Salary: \$52,500
    - Calculation:  $2 \times \$52,500 = \$105,000$
- **\*\*Total Salaries:\*\***
  - Calculation:  $\$420,000 + \$157,500 + \$105,000 = \$682,500$
- **Benefits:** Estimated at 20% of total salaries
  - Calculation:  $\$682,500 \times 20\% = \$136,500$
- **\*\*Total Compensation Cost:\*\***
  - Calculation:  $\$682,500 + \$136,500 = \$819,000$

### b. Utilities, Insurance, and Maintenance

- **Utilities:** Estimated at \$100,000 annually
- **Insurance:** Estimated at \$50,000 annually
- **Maintenance:** Estimated at \$75,000 annually
- **\*\*Total UIM Costs:\*\***
  - Calculation:  $\$100,000 + \$50,000 + \$75,000 = \$225,000$

### c. Boarding Operations

- **\*\*Boarding and Kitchen Staff Salaries:\*\***
  - 4 Full-Time Staff at \$52,500 each
    - Calculation:  $4 \times \$52,500 = \$210,000$
- **Benefits:** 20% of boarding staff salaries
  - Calculation:  $\$210,000 \times 20\% = \$42,000$
- **\*\*Total Boarding Compensation:\*\***
  - Calculation:  $\$210,000 + \$42,000 = \$252,000$
- **Boarding Expenses (Food, Supplies, etc.):** Estimated at \$150,000 annually
- **\*\*Total Boarding Costs:\*\***
  - Calculation:  $\$252,000 + \$150,000 = \$402,000$

#### **d. Total Annual Operating Costs**

- **\*\*Total Operating Expenses:\*\***
  - Calculation:  $\$819,000$  (Salaries and Benefits) +  $\$225,000$  (UIM) +  $\$402,000$  (Boarding) =  $\$1,446,000$

### **3. Endowment Fund Income**

#### **a. Target Endowment Size**

- **Objective:** Cover salaries, utilities, insurance, and maintenance from endowment interest
- **\*\*Covered Costs:\*\***
  - Salaries and Benefits: \$819,000
  - Utilities, Insurance, and Maintenance: \$225,000
  - **\*\*Total Covered Costs:\*\***
    - Calculation:  $\$819,000 + \$225,000 = \$1,044,000$

#### **b. Required Endowment Principal**

- **Assumed Annual Return:** 4%
- **\*\*Required Principal:\*\***
  - Calculation:  $\$1,044,000 \div 4\% = \$26,100,000$

### c. Fundraising Strategy

- **\*\*Phased Approach:\*\***
    - **Phase 1:** Raise \$10 million to initiate operations
    - **Phase 2:** Gradually increase to \$26.1 million over 5–7 years
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## 4. Revenue from Social Enterprise

### a. Vineyard Operations

- **\*\*Grape Cultivation:\*\***
  - 6 acres dedicated to champagne-style grapes
  - **Average Yield:** Approximately 2.5 tons per acre
    - Calculation: 6 acres × 2.5 tons/acre = 15 tons
- **\*\*Wine Production:\*\***
  - **Bottles per Ton:** Approximately 700 bottles
    - Calculation: 15 tons × 700 bottles/ton = 10,500 bottles
- **\*\*Revenue Projections:\*\***
  - **Wholesale Price per Bottle:** \$20
    - Calculation: 10,500 bottles × \$20 = **\$210,000 annual revenue**

### b. Production Costs:

- **Cost per Bottle Production (including vineyard management, bottling, marketing):**  
Estimated at \$8 per bottle
  - Calculation: 10,500 bottles × \$8 = **\$84,000 annual production costs**

### c. Net Revenue:

- Calculation: \$210,000 (revenue) - \$84,000 (production costs) = **\$126,000 net revenue**
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## 5. Updated Summary of Financial Plan

### Initial Capital Requirements:

- Property Purchase and Legal Costs: **\$3,862,500**

- Renovations and Initial Setup: **\$5,500,000**
- **Total Initial Capital Requirement: \$9,362,500**

**Annual Operating Costs:**

- Salaries and Benefits: **\$819,000**
- Utilities, Insurance, and Maintenance: **\$225,000**
- Boarding Operations: **\$402,000**
- **Total Annual Operating Costs: \$1,446,000**

**Endowment Fund Goal:**

- Target Endowment Principal: **\$26,100,000** (to generate \$1,044,000/year at 4% withdrawal rate)

**Social Enterprise Revenue:**

- Gross Revenue: **\$210,000**
  - Production Costs: **\$84,000**
  - **Net Revenue from Wine: \$126,000**
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## Phased Fundraising Strategy for a Tuition-Free Waldorf High School

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### Overview

This strategy outlines a phased approach to raise funds for the purchase, development, and long-term sustainability of the tuition-free Waldorf High School. The strategy focuses on leveraging a mix of capital campaigns, endowment building, social enterprise investments, and grant opportunities.

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### Phase 1: Launch and Foundation Building (Year 1–2)

**Goal:** Raise \$10 million to cover property acquisition, renovations, and initial operating expenses.

- **Target Amounts:**
  - Property Purchase and Legal Fees: **\$3.9M**
  - Renovations and Initial Setup: **\$5.5M**
  - Contingency Reserve and Startup Operations: **\$600K**

#### Approach:

1. **Major Gift Campaign:**
    - Secure commitments from high-net-worth individuals aligned with Waldorf and biodynamic principles.
    - Present a naming rights strategy (e.g., naming of buildings or key spaces).
  2. **Foundations and Grants:**
    - Target educational and environmental grant programs.
    - Examples:
      - Grants supporting sustainable education or rural development.
      - Initiatives for Indigenous partnerships, diversity, and equity in education.
  3. **Community and Alumni Campaign:**
    - Tap into the Waldorf community globally.
    - Highlight the unique nature of this tuition-free model and social enterprise component.
  4. **Corporate Sponsorships:**
    - Approach biodynamic and sustainable businesses for partnerships.
    - Offer visibility through events and branding opportunities.
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### Phase 2: Endowment Development (Year 3–5)

**Goal:** Build an endowment of **\$15 million** (on track to reach \$26M in Phase 3).

- **Target Amounts:**
  - Seed Fundraising Events: **\$3M**
  - Major Gifts: **\$10M**

- Recurring Contributions: **\$2M**

**Approach:**

1. **Endowment Campaign:**
    - Run a focused campaign with a compelling case for financial sustainability.
    - Emphasize the need to generate income to cover salaries and basic operations.
  2. **Recurring Donations:**
    - Establish a “Founders’ Circle” for recurring donations from community supporters.
    - Incentivize multi-year pledges through recognition programs.
  3. **Wine-Based Fundraising:**
    - Use early harvests of the vineyard project for exclusive donor events.
    - Introduce branded wine as part of fundraising packages.
  4. **Boarding-Specific Revenue:**
    - Initiate boarding program fee collection as a supplemental income source.
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### **Phase 3: Sustained Growth and Social Enterprise Expansion (Year 6–10)**

**Goal:** Achieve full endowment target of **\$26.1 million** and develop the vineyard project to generate consistent annual revenue.

- **Target Amounts:**
  - Remaining Endowment Goal: **\$11.1M**
  - Vineyard Development: **\$500K**

**Approach:**

1. **Social Enterprise Growth:**
  - Expand vineyard operations to include additional acreage or complementary products (e.g., honey, herbs).
  - Establish brand presence in sustainable wine markets.
2. **Legacy Giving:**
  - Launch a planned giving program targeting bequests and long-term gifts.
3. **Annual Fundraising Events:**
  - Host yearly events, such as galas or educational symposia, to maintain donor engagement and secure ongoing support.
4. **Partnership Development:**
  - Strengthen partnerships with biodynamic organizations and vineyards for knowledge sharing and co-branding opportunities.