



MONTESSORI BUSINESS MANAGERS ANNUAL RETREAT

6 & 7 August 2010
Hotel Realm Canberra

Friday 6 August 2010

Session 1: Welcome and Introductions

Christine Harrison, President, Montessori Australia Foundation

Christine welcomed the group to the inaugural annual Montessori Business Managers Retreat.

Steven Arnold, Principal, Brisbane Montessori School – BMS gone through challenging times of late, but it feels like they are on an upswing at the moment. Having learnt the hard way, Steven is now interested in supporting schools through their difficult times. He is proud of the calibre of people in his administration team and would like to share their skills and experience with the Montessori community.

Nadine Gagliardi, Business Manager, Brisbane Montessori School – is a CPA and fairly new to Montessori. The challenges at the moment include the FHAF and increased accountability and the BER works. Focusing on the balance between maintaining their strengths while growing the school.

Glynis Lance, Administrator, Barrenjoey Montessori School – working in a small school of 40 children, which is looking at starting a primary. Have been undergoing works with the BER. Has found that compliance is quite onerous in a small school. For the first time, they are facing challenges with enrolments.

Kris Trott, Chair, Brisbane Montessori School – has interest in governance, is a university educator with a background in accounting. She is on a number of committees and boards and runs workshops for the bursars association. Was asked to join the board during a change phase as they moved from a parents based to skills based.

Liz Percy, Business Manager, Northside Montessori School – has an accounting and health background. Recently focused on the BER works – the new building has just been completed.

Emma Gilbert, Bursar, Inner Sydney Montessori School – previously worked for 13 years in large independent schools including 2 years consulting to school systems. Would like to change the perception of Montessori in the wider education sector.

Cathy Swan, Principal, Inner Sydney Montessori School – started in Montessori in 1978, is a 3-6 teacher, and an AMI teacher trainer. Has undertaken building a strong administration team including a new bursar, enrolments officer and PA so that she can focus on working with children, families and teachers. Found that doing a jobs audit of the administration team was very helpful to reorganise the group.

Barb Langford, owner of 4 JSC Montessori preschools – over 20 years in Montessori. Has a personal as well as professional liability of the 800 families and 25 staff in her care. Does not get any funding from government. Has just opened one centre operating as a long day care centre. President of Child Care Associations of Australia. Focused on work around the new quality agenda. Also sees the recognition of Montessori as important.

Dimitri Nicolaou, owner/director The Central Coast Montessori School – which opened last February and is considering extending into primary in the next few years. Wanting to tap in the wealth of knowledge in the wider Montessori community.

Debbie Duburguet, Bursar, Kingsley Montessori School – there is 180 children in the school from 3-18 years including running the IB. The school celebrates its 50 years anniversary in 2012. She has a business background and has been focused on their huge building refurbishment programme, having to run the school from demountables for 12mths. Finds it difficult to deal with the increased accountability to the government and managing enrolments.

Catherine Clark, Bursar, Riverlands Montessori School – was previously working in the Catholic sector and at a large independent. Has found that it is very hands on working in a small environment, and is looking forward to the school growing.

Ineke Oliver, Principal, Riverlands Montessori School - principal for 3 years, with 15 years experience in Montessori. The school has been on the current site for the past 6 years, with a growing waiting list, but they don't yet have the money to build another building. Their last registration was awarded for 3 rather than 5 years due to their financial rating. They are struggling with how to manage the necessary growth. Their new building may be able to use by wider community or for an externally run vacation care. Proud of their solid governance with the self perpetuating board.

Leon Cohen, Finance Manager, Montessori East – with 110 children. He has a background as finance director in retail, with a focus on getting the school profitable and managing fees. Concerned about the lack of Montessori teachers available and retention in 9-12 cycle. Doesn't see much promotion of Montessori in the broader community,

Genie Shum, Business Manager, Southern Montessori School, Business Manager, 4mths in the role and in Australia, background accounting, worked in Hong Kong and New Zealand. Hadn't previously heard of Montessori.

Jill Vizec, Principal, Kalker Montessori School – her Business Manager, Glenda Kett was unfortunately unable to come. The school has been in operation for 33 years having moved to present site 20 years ago. They have 150 of 2-6 year olds at the school. The challenges include governance, with parents on Board often being time challenged.

Howard Russell, Finance Manager, Beechworth Montessori School – has an accounting background. The school was previously just a kindergarten but has been a school for 4 years. He sees challenges with the structure of the committee, problems with space and retention after preschool. The school recently won a tender for new site which was an aged care facility but they need funding to renovate.

Elizabeth Goor, Principal, Elonera Montessori School – has 25 years in Montessori. They too had acquired an aged care facility back in 2000 and have only just finished renovations. Face the challenge of finding Montessori teachers and maintaining sustainable growth. Looking at delivering the IB, but they need to be accredited with the Board of Studies in order to run the IB. Finding that accountability is onerous. On a personal level, she feels that she needs to work smarter.

Helen Still, Administrator, Forestville Montessori School – started in Montessori in 1985 and was Treasurer at FMS at one stage. The school has grown, with strong enrolments, a good reputation, and a strong under 3's programme encourages retention. FMS had a block grant, then the BER monies came in so much building works have been undertaken. This has meant that they have been juggling community concern during the construction.

Fran Reed, Principal, Forestville Montessori School – recognises the importance of having a great administration team, but, particularly being the building project manager, she has had to spend a

lot of time outside the classroom and away from children and parents. She has been at the school for 24 years, being 35 years in Montessori. Started the high school this year on a 5-acre property. Emphasised the need to ensure that your strategic planning is strong and that Business Managers are part of a team that needs to be working together. Finds that the biggest challenge is the administrative load for accountability.

Jack Rice, Principal, Canberra Montessori School – looking forward to networking with the group. Welcomed several of the delegates to his school for a school visit yesterday. Enrolments at the school are currently good.

Megan Tyne, Executive Director, Montessori Australia Foundation (MAF), Executive Director, Montessori Children's Foundation (MCF), Executive Director, Australian Montessori Teacher Education Foundation (AMTEF), Project Coordinator, Association Montessori Internationale (AMI) – worldwide, everyone is facing the same challenges, but it is encouraging to see a resurgence of Montessori internationally. Has been in Montessori for 25 years, when her children attended Forestville, where her daughter is now an Assistant.

Christine Harrison, President, Montessori Australia Foundation (MAF) – has been in Montessori for 25 years, originally the administrator at Canberra Montessori School, then later principal there for 12 years. CMS is a purpose built school architecturally designed. Faced the challenge of dealing with the complexities of a block grant application.

Sandra Allen, Office Manager, Montessori Australia Foundation (MAF) – with a background in hospitality, customer service and IT project management she was introduced to Montessori after enrolling her daughter 9 years ago. Joined the Maria Montessori Institute as the Course Coordinator when living in London for 2 years. Started with the Montessori Australia Foundation 3 years ago.

Comments from the group:

- Is Montessori growing in Australia? Over the past few years, there have been several schools that have closed, while only one or two new ones opened. Many of the schools have been growing though so numbers have increased. The growth at the moment has been in the long day care sector and in public schools.
- It was noted that WA has a regulation that in each age level they have to have a minimum of 20 children to start a new classroom.

Key Issues for Montessori in Australia

Megan Tyne, Executive Director, MAF

- Slide Presentation

Session 2: Directions for School Funding

Bill Daniels, Executive Director, ISCA

- Slide Presentation

Additional Comments:

- ISCA recently engaged UMR, a polling company, to undertake an online survey of 355 heads of schools in marginal electorates. To the question as to whether they are concerned that school funding in the future may not to be indexed annually, 99% responded in the affirmative. To the question as to whether non-indexed funding would impact their school fees, 97% responded that it would.
- Latest development is that the quadrennium has been extended by another year to 2013.
- The Catholic sector has a much higher reliance on federal government funding than the independent sector so they will be fighting for funding maintenance.

Group Discussion:

- In WA there are some government schools that have become independent. Bill's feedback was that he was unsure of how this is truly implemented, as the state government still owns the school. There is also the question as to how would you charge compulsory school fees in a government school.
- Is there still block grant money available? The BER is secure as most of the money is already under contracts. The capital program is still continuing, and the government has just committed to extending this past 2013. Bill's opinion is that the capital grants are not sustainable but that schools could be supported in other ways such as low interest loans for example.
- The role of ACARA was raised with Bill commenting that the level of transparency now available through ACARA has been revolutionary. The next version of the My School Website will be very comprehensive including showing school's resources. He confirmed that ISCA is represented on the ACARA board but it was interesting that DEEWR is not.
- Coalition promise to fund 6,000 disadvantaged children \$20,000 each was positive, although they would be unlikely to support other education initiatives of the current government. The Coalition have also said that they want to abolish the rating system in early childhood.
- National quality teacher standards are the responsibility of AITSL who are likely to be a more important body going forward.

Session 3: School Structure, Growth and Enrolment

Panel Discussion led by Fran Reed, Cathy Swan, Nadine Gagliardi, Christine Harrison

- An important issue for discussion is the introduction to a school of new children past the age of 3 without previous Montessori education. From a business manager or board point of view, there can often be pressure to enrol these children for financial reasons; however, schools need to consider the greater impact. Children who have not started in Montessori as a 3 year old, can cause disruption to the operations of a normalised classroom, require more interaction from the teachers and be difficult for other children and the child themselves. It is recommended that schools have a policy that protects the Montessori pedagogy with an option for the principal, on an individual basis, to assess any older children applicants by interview.
- A recommended balance for these students would no more than 10% of the school, although this number should not be written in any policy and would depend on the child, the class and the teacher.
- The importance to not just build enrolments, but to qualify these enrolments with families committed to the full cycle.
- Suggest that these children are taken on for a trial period eg. 2 weeks or 1 term
- Highlighted that a 0-3 programme is a great way to ensure preparation of parents and assist with retention.
- Other suggestions for parent preparation include:
 - School culture statement
 - "Montessori 101" an in-depth meeting with the principal
 - Regular Parent Information Evenings
 - Required reading eg. "Montessori Madness" by Trevor Eissler or "Raising Amazing Children the Montessori Way" by Tim Seldin
 - "Discovery" session where parents sit in a classroom as they were a child
 - Mandatory Open Day attendance and tours prior to enrolment
 - Interview the whole family including siblings
 - Observations mandatory
 - Acceptance of short term Montessori transfers visiting for one term (business managers to consider how schools can assist with these transient transfers in terms of bonds and fees)
 - Past students talking to parents
 - Staff members being ex-students
 - Observing cycle 3 classrooms at other schools
 - Physically locating 3-6 classrooms next to 6-9 classrooms so the parents and children can see the next stage

- Difficulties faced with the funding for special needs children being inadequate with parents sometimes contributing.
- What is an acceptable level of attrition e.g. 30% between cycle 1 and 2.
- The Montessori Research Committee is looking into tracking alumni.
- MAF would like to undertake do undertake surveys, and include the topic of retention to then develop targeted information for schools and parents.
- Important to start with a vision including retention, then implement policies and strategies to work towards this.
- Sponsorship of teachers for training is vital, including planning for the provision of relief teachers to augment the classroom while a teacher is on the course
- An example of a sponsorship may to identify an existing Assistant, preferably someone who already has a teaching degree, to financially support through the training. Establish a contract to work for a period of time in the school in exchange.
- Suggestion to connect with the universities, for example, by giving a guest lecture to teaching students on Montessori.

Session 4: Financial Health Assessment Framework

Nadine Gagliardi, Business Manager, Brisbane Montessori School

- Slide Presentation

Session 5: Montessori Sector to System

Peter Hollett, Educational Finance Services

- Slide Presentation
- Briefing Paper – System Considerations

Additional Comments:

- Need to check with DEEWR about whether to include the YR1-1 teachers in the Fhaf reporting.
- Ad-hoc group formed including Nadine Gagliardi, Debbie Duburguet, Elizabeth Goor to investigate the matter. Peter Hollett volunteered his services to assist in presentations to DEEWR.
- Need a minimum of 20 schools to start a school system.
- Would like to ensure that Montessori is not fragmented, so it would make more sense for MAF to be the school system or better a division of MAF.
- Window of opportunity now stretched to 2014.
- Issue of sustainability for MAF going forward to provide the increasingly demanding services.
- Concerned about growing Montessori schools – currently there is more attrition than growth.
- Concerned about the resources and accountability would be required to run a system.
- The government will be looking for school systems to provide the required 330+ new schools required to support the needs of the future.
- Membership would drive the direction of the school system.
- Important to explore the option and to debate the issues.

Saturday 7 August 2010

Session 1: Effective Management of Debtors

Emma Gilbert, Business Manager, Inner Sydney Montessori School

- Slide Presentation (not available for publication)

Session 2: Creating a Financial Dashboard for Montessori Schools

Jack Rice, Principal, Canberra Montessori School

- Slide Presentation
- Excel Spreadsheet - Dashboard

Session 3: Corporate Governance in Montessori Schools

Presentation and Panel Discussion

Kris Trott, Board Chair, Brisbane Montessori School

Additional Comments:

- Suggested sources for independent Board members include past parents, alumni, Rotary, Chamber of Commerce, companies who are involved in children (eg Girl Scout, local museum where the children visit) and other schools.

Session 4: Global Montessori Update

Megan Tyne, Executive Director, MAF

- Slide Presentation

Session 5: Feedback and Next Business Managers Retreat

- Suggestion that Board Chairs as well as Business Managers attend
- Recognition and thanks to Megan and Christine for their tireless work