



Institut Rudolf Steiner au Québec

Rules and Principles

January 30th, 2020

Part A: Mission and Waldorf Identity

A1. Declaration and description of the institute's mission and identity.

History

Institut Rudolf Steiner au Québec was founded in 1990, under the name of *Séminaire Pédagogique de École Rudolf Steiner de Montréal*. In 2002, under recommendation of James Pewtherer, then Chair of the Pedagogical Section Collegium, the Montreal teacher training became an independant institute under the name of Institut Rudolf Steiner au Québec. In 2003 it incorporated the AWSNA as a Developing Institute. Within this new legal and administrative framework, the institute continued to thrive and maintain its standard of excellence in its programs and courses with the participation of renowned guest lecturers. Many great people participated in the foundation and the development of this program. Among them the institute would like to mention René Quérido, Henry Barnes, Christie Barnes, Georg Kühlewind, Friedemann Schwarzkopf, Robert Thomas, Freya Jaffke, Dr L. Fulgosi, Jean-Michel Florin and many others. Calling on the support and collaboration of inspiring figures in the movement has been and will continue to be an important part of the



institute's culture. This has always been greatly appreciated by the student teachers and the Quebec community at large.

The work began with the encouragement and guidance of René Quérico, who had recognized the specific challenge involved in finding trained and dedicated teachers fluent in the language and culture of the French-speaking École Rudolf Steiner de Montréal; an essential factor for its development and for the pedagogical movement in the region. Thus up until recently, most of the teachers working in the schools of Québec, including École Rudolf Steiner de Montreal, École des Enfants de la Terre in Waterville, École L'Eau Vive in Victoriaville, École La Roselière in Chambly and École Imagine in Val David were trained by the Séminaire Pédagogique, later, Institut Rudolf Steiner au Québec.

In 2004, the Rudolf Steiner College in Fair Oaks, California, needed urgent support at the level of the Program Directors, due to severe health condition of one of the Teacher Education Directors. It was time to give back what had been received from René Quérico. Irène Morzadec-François, on sabbatical at the time and finalizing the writing of her PH.D. Thesis, accepted the offer to go and help at Fair-Oaks-Sacramento Campus with the idea that RSC and IRSQ could be perhaps develop a partnership. An agreement was found where the students of IRSQ would complete their Foundation Studies in Montreal and come to Fair Oaks in the summers to take their Pedagogical Courses together with the students of RSC. From her position as Program Director both in Fair Oaks and in Montreal Irène Morzadec-François was able to coordinate a coherent and beneficial exchange. This arrangement continued up unto 2009; it was an enriching and positive experience for the students as well as for the two institutions. The Montreal students obtained their Waldorf Diploma conjointly from RSC and IRSQ in 2009. This project did not go beyond 2009 however, too few students of the Montreal cohort at the time had sufficient knowledge of English and the cost of such a program was also quite prohibitive.



In 2010 IRSQ was only able to offer foundation studies courses in Montreal, and in the Laurentides region for the burgeoning initiative in Val David. In consequence it became very challenging for ÉRSM to find trained teachers for its kindergarten groups and classes. The need was so dire that the school resorted to hire untrained teachers, even for lead positions in the Kindergarten and the Grades. In 2014, with the full support of ÉRSM the IRSQ began offering again a full Teacher Education Program. The Waldorf initiative in the Laurentides was also on board. A second cohort of student teachers enrolled in the 2015 course and another in 2018. Prospects are still open for a 2020 cohort.

Mission

The Institut Rudolf Steiner au Québec is a cultural non-profit organisation, free, autonomous, and self-administered, according to the Quebec Law on Companies, Part III (L.R.Q., chap. C-38, art.218).

Its mission is to maintain a center of study and research open to any adult, aspiring to a free spiritual life and wanting to know anthroposophy in the region of Québec. Its principal activities include Steiner-Waldorf Pedagogy training programs, artistic workshops, conferences and social events in the region of Québec.

Its goals are only for cultural purposes, without financial profit for its members; they include:

- Maintaining, organising and developing a research and study center for a free spiritual life;
- Offering a multicultural space where students and teachers will work together in freedom in the study of the arts, sciences and humanities in light of Rudolf Steiner's philosophy.
- Providing pedagogical support and trained teachers to the Waldorf Schools and Waldorf School initiatives in the province of Québec.
- Training teachers in Rudolf Steiner's pedagogy and introducing any interested person in foundations of that pedagogy, this in accordance the rules and obligations of the Quebec Law on Private Education (L.R.Q., c. E-9);



- Organising public cultural activities, including study seminars, art workshops, concerts, exhibitions or shows.

Identity

Institut Rudolf Steiner au Québec's identity is founded on the principles of Rudolf Steiner's anthroposophy and philosophy within a French speaking cultural space. It is deeply rooted in the work of the Pedagogical Section of the School for Spiritual Science at the Goetheanum.

Institute Growth Plan

As stated, the Institute's main goal is to train French-speaking Waldorf teachers for the schools of Québec, and within that framework its growth directly mirrors the development of the schools in Québec. In providing pedagogical support, training and expertise the Institute strives to meet the needs of these schools and initiatives and contributes directly to their growth. Furthermore, the Institute is regularly engaging the various school-parent communities with its events and course offers, thereby contributing to the development of rich social relationships within these milieus. Most of the prospective students of the Institute come from the parent communities.

As it stands the local population and community demographics liable to provide a viable growth for the Institute are as follow: there is an an independent K-8 Waldorf school in Montreal with approx. 200+ students, another K-5 initiative in Val David with approx. 70 students, one K-8 public Waldorf-inspired in Waterville with approx. 200 students, one K-6 public Waldorf-inspired in Victoriaville with approx. 135 students, and in addition, several Waldorf-inspired early childhood initiatives and nurseries around these schools. There has also been an interest emerging recently from certain public school boards in the province to provide Waldorf-inspired classrooms in their communities.



In respect to these factors there appears to be a definite potential for growth and for the continuation of the Institute's core activities.

A2. AWSNA Principles living in the Institute

Principle #3: "An Anthroposophical Understanding of Human Development Guides the Educational Program"

a. Anthroposophical understanding of human development structures the organization and progression sequence of courses, seminars and workshop. Learning processes follow a path of transformative, participative experiences throughout the three-year program, with each year building on the experiential knowledge acquired in the previous year. The yearly return of themes and reflections in the program provides the students with a unique opportunity to integrate and deepen their understanding of human development in a seasonal cycle of growth. They are better able to understand the development of the children in the field based on what they have experienced and developed within themselves during the training.

b. The order and sequence of courses and workshops is optimally planned according to Rudolf Steiner's insights regarding the development of the different specific components of human nature. For example, when studying Rudolf Steiner's *Theosophy, Chapter one*, pertaining to the interaction of etheric forces with the physical body in the development of human life, the students will have the opportunity to experience these forces at work artistically through clay-modeling and Bothmer Gymnastics. An analogous approach is offered when studying human biography and soul forces: the students will have classes in Werbeck Singing, Bothmer Gymnastics and Eurythmy, etc. It is such innovative



experiences that have most pleased the students, allowing them to integrate the different learning fields in a cohesive world outlook.

c. This principle is very much part of the institute's success in training able and dedicated teachers. For certain students it might constitute a difficult regimen to follow however, namely for those already in position in a school, given that their workload often comes in conflict with the requirements of the training. This is especially true of class or group teachers. For those working in the public sector this does not seem to be a factor.

The Institute has therefore often conversed with the school administrations and sought measures to mitigate these issues, but the intense workload and the urgency of the situations in the schools are such that there is very little leeway. To accommodate these students the Institute offers the possibility to extend the course of study up to a year. The Institute also reduced the number and duration of weekend classes. The Institute strongly recommends that for the duration of the training students only take part-time or assistant level positions in these Waldorf schools.

Principle #5: "The Conscious Development of Human Relationships Fosters Individual and Community Health"

a. Rudolf Steiner's leading thought "Thinking is the true communion of mankind" and his "Motto of Social Ethics" constitutes the foundation upon which all policies of the Institute are elaborated and conducted. Regarding outreach policies, for instance, all events organized by the Institute are conceived and developed out of an understanding of the needs expressed by the different communities, schools, parents, teachers, children. Consultation and dialogue are therefore primordial. Clear thinking and social awareness are key elements of the Institute's culture: all



courses and activities strive to foster the students' ability to distinguish that which pertains to individual, subjective perspectives, from the objective requirements of the work community in service of the children. Schools are a space of self-realization primarily for the children, and secondarily for teachers, and staff. Throughout their training, students will engage in specific mindfulness exercises such as concentration, attentive listening, focused and peripheral thinking etc. to acquire this awareness. Engaging in community tasks and varied responsibilities such as organizing communal meals, setting-up and caring for workspaces, organizing assemblies and festivals for family and friends - will further strengthen their social skills. In this spirit of sharing, the Institute regularly opens portions of its events, workshops and seminars to teachers, alumni/ae and parents.

b. Innovation.

In recent years the Institute initiated professional courses addressed to the teachers of the schools and the students on specific issues such as, "Child Study" and "Class Portraits" with Christof Wiechert in 2017 and 2021, a field research project with active teachers on the theme of "The Challenges of the Education of the Will" in 2020 and 2021 with the special collaboration of Dr. Michaela Glöckler.

c. The main challenge facing the Institute today, involves the scheduling of events and programs in consultation with the different communities and initiatives in Québec. In recent years, there has been a steady increase in the number of events organized within the Waldorf and Anthroposophical community in the region, representing varied and often divergent interests. This large offer does not seem to be commensurate with the limited number of potential participants. The



resulting dispersion has contributed to a climate of competition and a decrease in participation for all events.

Financing rallying events, with keynote lecturers such as Christof Wiechert, Jean-Michel Florin or Michaela Glöckler has become risky, if at all possible. Evidently, a greater collaboration and understanding is needed between these initiatives; priorities need to be set, namely, in our view, the development of the schools. In this respect, École Rudolf Steiner de Montreal has consistently shown interest and support for the events initiated by the Institute, with many of its teachers participating in the professional workshops. There has been a noticeable increase in participation as a result of the Institute reaching out to the teachers' college and consulting with them regarding their current needs and interests. An offer of collaboration has been sent out to another teacher training center of the region for an event scheduled in the coming year.

Principle #7: "Institute Leadership and Governance Are Guided by Collaboration and Shared Responsibility"

a. Policies, culture, practices

Leadership and governance of the Institute is initiated and carried out by the members of the board and the pedagogical council, in shared responsibility and collaboration. The members of the board and faculty are co-opted according to competence, affinity and shared values. Leadership in the different areas, pedagogical, administrative, financial, outreach and communication, infrastructures is assumed according to competence and disposition. Decisions on governance are carried out by consensus according to a system of mandates. Responsibilities are shared according to fields of activity.



The Institute as an organization in service of Anthroposophy and Waldorf education acts in accordance with the values and principles of the Pedagogical Section of the School for Spiritual Science and the Association of Waldorf Schools of North America. The Institute's governance culture values unconditional dedication to its mission and goals, and respect and support for individual initiatives. Leadership and initiatives relevant to pedagogical activities and events are assumed by the council of teachers and the Program Director; leadership and initiatives relevant to outreach and public relations, marketing, budget and cash flow, are carried out in shared responsibility by the Board and the Administrator.

b. Innovation

The institute has recently initiated a reflection in support of the development and formation of a more structured and autonomous Student Council. Until now the voice of the Student Body was heard and taken into account essentially on the occasion of end of course reviews, end of sessions, and end of year reviews. These oral and written reviews have been conducted individually, and in group context. The aim would be that the Student Body develop an independent form of collective reflection and self-governance relating to student issues, concerns and initiatives - this in preparation for the future challenges of collegiality, working in a Waldorf school.

c. Challenges, Compromises

Recruiting eligible and dedicated board members is presently a challenge for the Institute. The board is actively engaged in the search since the fall of 2019 and is currently evaluating several prospects. Beyond this specific situation, the ever-present challenge of finding sufficient funding for the programs, and developing tuition assistance strategies allowing greater enrollment, have placed a



strain on the Institute's growth. The requirements of an ever-expanding administrative workload related to the AWSNA membership procedures, the lack of financial resources for basic business operations, such as marketing, IT and social media, secretarial and translation services, etc. has had a significant impact on the Institute's ability to remain competitive and accessible. Compromises have been made to mitigate these issues, often in the spirit of self-sacrifice, regarding salary cuts namely, and increased workloads. Nevertheless the Institute, its faculty and board, maintain their dedication to its core mission in service of the Québec community.

Part B: Policy and Practice Review

B1. Response to *Policies and Practices #1 & 2*

B1-1 Independence

Institut Rudolf Steiner au Québec is an autonomous, self-administered, cultural non-profit organisation operating according to the Quebec Law on Companies, Part III (L.R.Q., chap. C-38, art.218) and the Quebec Consumer Protection law. It has full liberty to determine its structural organization, its operating principles and internal regulations. Its Board of Trustees and Teachers' Council govern the institute. Members of the board are co-opted.

a. The Board of Trustees

The Board of Trustees it is presently composed of 4 members:

Anne St Aubin, president
Irène Morzadec-François, vice president
Philippe Hétu, treasurer
Michèle Arsenault, secretary

The Board meets once a month to :

1. Work towards the visibility and presence of the institute in Québec;



2. Develop and sustain relationships with pedagogical and anthroposophical institutions on the local, national and international level, including the Pedagogical Section, AWSNA & TEDC, WECAN and the local Waldorf-Steiner schools communities;
3. Prepare and manage budgets and assets and apply financial policies;
4. Develop new ideas and initiatives to better address capital funding, student loans and scholarships, and development funding;
5. Manage infrastructures;
6. Green light proposals initiated by the Teachers' Council regarding special events;
7. Recruit and co-opt new members;
8. Create and review documents for policies and practices.

Agenda and official minutes of the meetings are confidential; the Administrator Michèle Arsenault consigns them according to standard legal procedure.

b. The Council of Teachers

The Council of Teachers is presently composed of six members and is chaired by the Program Director and the Administrator:

- Irène Morzadec-François, Ph.D., Program Director and teacher
- Odile Moullé-Monteaux, Associate Director for Early Childhood
- Michèle Arsenault, Administrator and Spacial Dynamics and gymnastics teacher
- Pascale Verstrepen, instrumental music and choir
- Marjorie Talliano, Eurythmy
- Micheline Cossette, visual arts, painting

(To these core members a number of adjunct teachers are solicited each year according to the needs of the program courses and special events; regular contributors include: Robert Thomas, Christiaan Boele, Jean Balekian, Guillaume François, Anne St Aubin.)

The Council of Teachers meets on average six times in the year on the occasion of regular - and intensive - course previews and reviews. Together they:

1. Work towards a common pedagogical vision in accordance to the needs of the students and future teachers;



2. Adjust activities according to the skill level and abilities of the students within the framework of the program goals;
3. Assess the work and achievements of the students, including course participation, assignments and individual research projects;
4. Supervise the students' pedagogical orientations according to aptitude;
5. Share work experience and course content;
6. Plan and determine themes for special events and workshops;
7. Create documentation for the policies and practices of the Educational Program.

In addition, the Chairmanship of the council meets once a week to follow up on pedagogical situations and maintain a conversation with the Board members according to need.

B1-2 Responsible Self Reflection

The institute is committed to the AWSNA's policy and practice of the seven-year cycle of self-study and peer review. It is also committed to implementing the self-identified priorities for growth and change that emerge during the self-study process and addressing the recommendations made by the visiting team.

The work leading up to the elaboration of the present document has been a significant contribution to the self-study and assessment process of the institute.

The continuing process of Responsible Self Reflection is a fruitful undertaking; it has given the institute the opportunity for instance, to develop new ideas regarding the constitution of a student council.

The habitual and regular practice of reviewing and previewing program courses and activities with students and faculty reflect a core policy of the institute: to remain fully receptive to actual and present themes and issues living in the student body and society at large. The rapid pace of transformation in today's social and cultural spheres dictates mobility and flexibility. The institute is therefore committed to respond in its practices to the realities of life and adjust its rules and principles accordingly.



This specific culture of self-review in the Teachers' Council and the Chair Committee places an emphasis on the developmental activity and the inner work of the teacher rather than on an accumulation of didactical contents or on assimilating a system. This does not underestimate however, the value of the methodology developed by Rudolf Steiner in his teaching plan.

The outcome of Self-review practices has also reinforced the institute in its belief that it is greatly profitable for students of the region of Québec to do at least one four-week practicum outside the country in a well-established Waldorf School with experienced master teachers. Creating bonds and nourishing relationships with other leading schools is important for the future teachers and cultivates awareness for the international dimension of the movement. The institute and the students are thus very grateful for the collaboration and support of schools such as École Michael in Strasbourg, École Matthias Grünewald Colmar, Écoles Rudolf Steiner in Genève and Lausanne, the Rudolf Steiner School in New York City, the San Francisco Waldorf School and the Toronto Waldorf School.

The practice of Responsible Self Reflection has brought greater clarity regarding the priorities defined by the TEDC's visiting team in the Fall 2018:

1. Communication with ERSM and École Imagine was reinforced in consideration with their need for trained teachers. Collaboration for an upcoming pedagogical conference is also underway.
2. A detailed completion plan was given to the student teachers of ERSM affording them the opportunity to obtain their Waldorf certificate within a reasonable timeframe.



3. Students receive a detailed set of guidelines for each of their practica.
4. According to Québec law the Institute is not obligated to provide further by-laws other than those specified in the charter. The institute however has undertaken a procedure to revise and update the existing by-laws to incorporate modifications suggested by the TEDC, namely terms length and limits and non-employee/relatives board members.
5. At present the majority of board members are non-teachers i.e., three out of five. There are no family relatives on the Board.
6. The institute is working on a seven-year succession plan.
7. Non-profit -or equivalent, paperwork is to be found in the annex.
8. The initial self-study process will be completed with the submission of the present document before the end of February 2020.

B2. Policies and Practices inventory

Policies and Practices # 3: Support for Students.

The institute is committed to supporting students and establishes and implements documented policies and practices that demonstrate this in the following areas:

a) Application and admission policies are as follow:

1. Prospective students are invited to an informational meeting where they are presented with the program goals, general procedures and requirements.



2. They complete a registration form and produce letter of intention, a two-page biography, a resume and photos.

3. Prospective students are met by the Program Director and the Administrator for an interview upon reception of their application. Policies regarding tuition fees and payments, attendance, fieldwork modalities, course work and research assignments are presented in detail. The different possibilities regarding tuition assistance, grants and loans are also presented. At the conclusion of the interview they are informed of the mutual obligations entailed in the contract and given time to study it at home.

4. They are then sent a letter of acceptance with an invitation to sign the contract with the Administrator.

5. For each following year the students are required to sign a simplified renewal contract.

b) Contracts and refund policies:

1. Contracts and refund policies are presented in detail during the admission interview, including the non-payment clause. Student are given time to study the documents and an appointment date is set for the signing. Before signing they are once more given the opportunity to read the contract with the Administrator and ask any relevant questions.

2. The duration of the contract runs one academic year and is to be renewed before the start of the following year.



3. In cases where students opt to discontinue the program during the year in progress and break the contract, they must inform the Program Director in writing and schedule an appointment with the Administrator to settle the accounts. If the student fails to notify the Program Director and the Administrator, their fees will continue to be charged until the end of the academic year. Any reimbursement or outstanding payments will be settled in accordance with the regulations stipulated in the Québec law on private education: Loi sur l'enseignement privé (L.R.Q., chapitre E-9.1) / CHAPITRE IV Contrat de services éducatifs. For further details please consult the appropriate documents in the annex.

c) Tuition, tuition assistance and financial accessibility

1. Students must settle the total amount of their tuition each year by the first of May. They are given the option to do so in three, five or ten scheduled payments in agreement with the Administrator.

2. If they are late in their payment they will receive a notice from the Administrator asking them to schedule an appointment to readjust their payment schedule.

3. Students are presented with the different types of financial aid offered by the AWSNA. The institute has begun procedures last year to become a member of the WECAN so that students of the early childhood orientation may also benefit from tuition assistance.

4. Students holding teaching or assistant positions in ERSM and École Imagine can further benefit from financial assistance from their school's continuing education fund and the AWSNA CPT Fund.



5. Financial accessibility remains a priority when developing budgets; present tuition fees are well below the average among Waldorf-teacher training institutes in North America and have not been increased for the last six years.

d) Student assessment and support:

Student assessments are based on course participation, fieldwork completion, written assignments and/or oral/artistic presentations.

1. Syllabi. Students are given course syllabi in advance of each course with a course description, number of class and personal work hours, number of credits, instructor name and contact, learning objectives, required and recommended reading and a daily schedule of course content, assignments and activities.

2. Reading lists and schedules. Students are given each year at the end of the summer session reading lists and course schedules for the following academic year. They are expected to procure themselves with the books necessary for course work.

3. Attendance. Attendance is taken by the course instructor at the start of each class. Attendance sheets contain rubrics for tardiness, attendance percentage and completion status. They are submitted to the Program Director at the end of each course.

4. Course Report. At the end of every session students are given a Course Report documenting course completion status for each course, assignment completion status and practicum evaluations. Students with incompletes are met at the start of the following session to review their situation and submit a completion plan.



5. Written assignments. Students may be given written assignments relating to specific course work described in the syllabi. Submission deadlines are then specified in the syllabi. At the end of each session they are required to submit a written retrospective of the semester. After each practicum they must submit a written fieldwork report. In addition they must conduct each year a research project on a specific theme, chosen from a list and following specified guidelines. For this they are required to submit a written report and make an oral presentation. Throughout the courses in the year they may be given reading assignments and/or required to give oral presentations, as specified in the course syllabi.

6. Field work report. Students are given ahead of their practicum a set of guidelines and assignments that are to be followed for the duration of their internship. They are asked to maintain a daily journal of their activities and observations that is to be submitted upon their return to regular classes. The master teacher assesses the student teacher's fieldwork in an evaluation form according written guidelines. After each practicum students are required to share their experience with their peers and program instructors in a semi-formal oral presentation.

7. Artistic work. The students' artistic course work is assessed at the end of each semester during a public presentation of their achievements in the fields of instrumental music, choir, eurythmy, storytelling and visual arts.

8. Tutoring. Each week after regular courses a time is scheduled for a meetings between the Program Director and the students where they may share information, ask questions and address eventual concerns.



9. Group and individual review meetings. At the end of each semester students and Program Director convene for a retrospective of the course work and activities, to assess progress made and future objectives. It is accomplished according to the principle of *Rückschau*, or retrograde review. Individual meetings are scheduled at the end of each academic year to review and appraise the students' work and orientation.

e) Graduation requirements. To graduate from the program and to receive their certificate in Waldorf-Steiner Teacher Education, student must have successfully completed all courses of the three-year program, submitted the three, year-research projects, and successfully completed the three practical internships. In case of transfer students coming from other accredited institutes, equivalencies are established at the discretion of the Program Director for each individual case.

f) Behavioral expectations, including communication protocol.

1. Students are expected to conduct themselves according to ethical values of respect, trust and open-mindedness.

2. Students are expected to engage fully in the work and strive to meet the objectives of the program to the best of their abilities.

3. Students are encouraged to share with the instructors or Program Director any relevant issue or concern impeding their ability to understand and engage in the activities or assignments required by the program.

4. Students are encouraged to participate in all chores and tasks incumbent to sharing a common workplace and to participate in the preparation of all social events organized by the Institute.



5. Students have the possibility to contact the Program Director, the Administrator and the individual course instructors by email. At the start of each year they are given a contact list of all students and faculty email addresses. The list is confidential and may be used for intern purposes only. They may also use email to request an office or a telephone appointment with an instructor or administrator during their office hours.

6. A document detailing the calendar of events of the following academic year is given per email and hard copy at the end of the spring semester.

7. Students receive electronic and hard copies of the syllabi at the beginning of each course.

8. Schedules, reading lists, year-project guidelines, are given to the students in hard copy in a specific meeting during the summer intensive session. Time is taken at this point to present the content and requirements of the upcoming year and to clarify any ensuing questions.

9. At the start of the fall semester students are given the Practicum Guidelines and Objectives document in preparation for their internship. They are also given a work calendar detailing the steps needed to complete their year-project.

g) Suspension, dismissal. The institute in its present stage of development does not have an official protocol regarding suspensions and dismissals.

h) Grievances. Students are encouraged to address their grievances concerning issues relating to service satisfaction, inappropriate behavior, or incompetence, with the Program Director, the Administrator or, if appropriate, with the course instructor.



i) Conflict resolution. In situations of conflict requiring an official resolution, the institute has always privileged direct intern discussion and dialogue with the parties involved. Participation of the faculty or staff in the process is determined according to propriety. In some occurrences a third party may be solicited to contribute an alternate point of view.

j) Record-keeping. Financial records, payment history and confidential contractual documents are consigned and kept by the Administrator for seven years at the disposal of the board, after which time they are archived.

Academic records and confidential student files are consigned and kept by the Program Director for seven years before being archived.

Policies and Practices # 4: Support for Faculty and Staff

The institute is committed to supporting faculty and staff and establishes and implements documented policies and practices to demonstrate this in the following areas:

a) Recruitment, hiring, and orientation: The institute recruits and hires instructors who have demonstrated leadership and innovation in their field of expertise working in Waldorf Schools and shown their dedication to Rudolf Steiner's philosophy and pedagogy. However a rule is a good rule when it can accept exception; then excellence of competence is expected.

b) Mentoring, professional development, and assessment: Beyond regular council meetings, the Program Director and other experienced instructors of the institute will meet with new colleagues as needed.

c) Compensation, including benefits: there are no salaried employees at the institute; every instructor is paid per hourly rate, as decided by the Board of trustees and indicated in the budget.



d) Professional behavior and expectations, including communication protocol: Collegial relationships are based on trust and respect; if there is any lack of professionalism, it will become manifest in one or the other of the meetings with students or colleagues, thanks to a policy of regular retrospective sessions.

e) Dismissal: In the course of 30 years of activities, the institute has never met such a situation. Should this arise, Administrator and Program Director would necessarily have to meet with the colleague in question for a conversation. They would then proceed to assess in common accord whether the contract needs to be terminated and provisions therein be applied.

f) Grievances: For the whole duration of its 30 years of activities, the institute was never confronted to such a situation. Should this occur, the Administrator, the Program Director and a teacher would need to meet with the colleague and see together what can be done for the best of the situation. The institute believes in the power of conversation, if it is well led. The institute is preparing a code of conduct document for instructors to be included in the future handbook.

g) Record-keeping: Instructors are given ahead of each session attendance/assessment sheets and syllabus forms to fill out. They must give the syllabi to the students before the courses begin. The attendance sheets with assessments are submitted to the Administrator at the end of the courses. These documents are kept in files for the Program Director to write the year report sent to the students.

h) Conflict resolution: The institute values a conversation culture based on mutual respect, attentiveness and trust. Over the years this simple approach has always brought about the most positive results.



Policies and Practices # 5: Engaged Community.

The institute is committed to developing a healthy, vibrant community in service of the institute's mission. The institute consciously builds relationships with current and alumni/ae members of its community, as well as the community beyond the institute. It also identifies its commitment to diversity in the school community. The institute establishes and implements documented policies and procedures to support the following areas:

a) Friends and fundraising: At regular intervals throughout the year, the institute will share its calendar of activities and announce its public events to its community, friends and alumni/ae and the schools' parent communities. The Board of Trustees is currently working on various fundraising and outreach projects. It is actively searching for new members from these communities to build new and dynamic relationships for relaying its activities and support its mission.

b) Community events: End of session assemblies and presentations, students' Year-Project presentations, graduations, special pedagogical and artistic events with invited guest lecturers such as Christiaan Boele, Jean-Michel Florin or Frederick Amrine, are always opportunities to invite teachers of Waldorf schools in the region, and/or current or previous parents of schools, special or official guests, according to the nature of the event. Friends of the Anthroposophical Society are always welcome. The announcement of the events is sent through a mass mailing, including schools in Ontario and Vermont; is posted on the website and the Facebook page of the institute, on the e-journal of the Anthroposophical Society in Canada.

c) Alumni/ae: They are the first to be informed and invited to the events and the programs of the institute. Sometimes they are welcome to slip in the classes at no fees. When there is strength and time, alumni can organize nice, social gatherings with teachers.



d) Diversity statement: The institute is committed to a culture of inclusion across race, gender, age, religion, identity, and experience; it celebrates diversity and shared values among its students, staff and faculty.

Policies and Practices # 6: Articulated Educational Program.

The institute is committed to consciously creating a clearly described educational program. It establishes and implements documented policies and procedures to create and review the following areas:

a) Curriculum: There is a vision of the whole curriculum and its different stages of development but it remains open to changes and metamorphosis, following the evolution of life. It is stated in the document *Calendar*

b) Pedagogical practices: we use different kind of practices such as book reading and studies by Steiner and others, seminaristic studies involving more actively the students and of course, artistic classes and workshops.

c) Assessment methods: assessment of written work, class participation, oral presentation, artistic creation and presentation, teaching practices.

d) Supplementary programs: Yearly research project, artistic performances and creations.

Policies and Practices # 7: Articulated Decision Making.

The institute is committed to establishing and implementing a documented governance structure that defines and delineates responsibilities for each leadership position and group. The documentation includes a clear description of how these groups collaborate, communicate, and make decisions. Policies and procedures address the following areas:

a) Governance structure, areas of responsibility, authority, and accountability:
The institute presently relies on the “IRSQ Charter” document dating from 2015. The Board has undertaken revision and update of the document. See above **B1**.

Response to Policies and Practices #1 & 2 and the charter.



b) Strategic planning: The Board of Trustees operates on a three-year strategic plan straddling the three-year pedagogical plan. Planning for a new course cohort begins in the middle of the second pedagogical year. The Board will create a document detailing this practice.

c) Crisis and risk management: At present the institute does not have a documented and detailed policy relating to crisis and risk management. The situation will be addressed in priority during the upcoming board meetings. However to this point, we would like to quote Peter Selg to whom we refer gladly (Rudolf Steiner's intention for the Anthroposophical Society p. 6):

It is quite obvious that most of the Anthroposophic institutions (or institutions resulting from anthroposophy), including Waldorf Schools and curative education homes; and also individual clinics and one anthroposophic medicine producer; are currently facing existential crisis. And these crisis are not primarily or exclusively financial in nature, but concerns their spiritual substance and inner identity, their spirit and what they see as their task; that is, their unique contribution to our culture.

“ Instead of a living representation of anthroposophy, only administration exists”, says still Peter Selg (Id. p 2); there is the danger: “ Hypertrophy in the administrative and executive council apparatus”. The institute is willing to avoid these dangers.

d) Conflict of interest: The institute is working to articulate a policy addressing this area.

Policies and Practices # 8: Sufficient Resources.

The institute is committed to ensuring there are sufficient financial, human, and material resources to support its stated mission. The institute establishes and implements documented policies and procedures in the following areas:



- a) Financial, facilities, and material management: The Board defines and accounts for all policies and practices relating to finance, facilities and material management. Its decisions on the matter are documented in the minutes of the Board meetings. A document describing these policies and practices will be made according to priorities.

- b) Budgeting, Three to Five-year planning: A document describing these policies and practices will be made according to priorities.

- c) Annual audit reviews: The Board of Trustees conducts an annual review of its activities for the closing of each budget year. It is documented in the minutes of its meetings.

- d) A full audit, occurring within two years prior to the site visit, if the annual budget is > \$500,000: The budget of the institute is well below \$500,000 therefore it does not undergo full audits.

Policies and Practices # 9: Prioritization of Health and Safety Considerations.

The institute is committed to the health and safety of students, colleagues, community members, and other individuals on campus. The institute establishes and implements documented policies and procedures in the following areas:

- a) Harassment prevention: The institute is a small community of good friends, working to develop social skills, working-together- team skills; most of them are colleagues in the same Waldorf school and the life at the institute is based on the respect and appreciation of each other.

- b) Emergency preparedness, including natural or human-caused emergencies: The institute follows the regulations of the premises it has rented according to contract.



c) Public health notices: The institute follows all regulations emitted by the public health authorities.

d) Appropriate student screening: The institute follows all regulations and requirements of the local authorities.

Policies and Practice #10: Prioritized Legal Compliance.

The institute establishes and implements documented policies and procedures in accordance with its charter of incorporation.

a) Federal regulations. The institute is a registered company in the Province of Québec and as such it is compliant with all relevant federal laws. There are no salaried employees, only freelance contractual employees. For income tax declaration purposes it emits yearly income statements for each employee at the end of the fiscal year. In accordance with the Income Tax Act, students of the institute are given receipts for education deduction claims. These receipts are also valid for Provincial Income Tax deductions.

b) Provincial regulations. The institute operates in full compliance with the Quebec Law on companies (L.R.Q., chap. C-38, art. 218 and art. 87) and with the Quebec Law on private education (L.R.Q., c. E-9). Upon signature of their contracts students are informed of their rights relating to end - or breach - of contract terms as regulated by the Law on Private Education (L.R.Q., chapitre E-9.1).

c) Local regulation. The institute follows local regulations incumbent to its status of tenant renting the premises of École Rudolf Steiner de Montréal, with all obligations stipulated in its contractual agreement.



Part C: Reflections and Future Plans

C1. Strengths and Challenges.

One of the core values of the institute is to provide pedagogical content and practical activities of the highest possible quality. Since its beginnings in 1990, the institute has always invited the most inspiring figures of the movement to participate in the education of teachers in Québec. To this day it has always continued to cultivate long term relationships with the most inspiring schools in the movement, with the aim to offer the best possible immersive and practical experiences for its future teachers. Participating in the global movement of Waldorf-Steiner schools in the world has been at the heart of the institute's activity. This particular feature has spoken very strongly to the institute's students, it is something that alumni/ae have consistently praised and recall with fondness. In recent cohorts, with participants coming from increasingly diverse backgrounds and cultures, this openness and interest to work within the larger community, building lasting and inspiring relationships, has become a distinguishing quality of the institute.

Another important principle active in the institute is the care that is given to the progression of learning, where course work and activities are artfully combined in precise sequences to support and sustain the development of integrative and experiential knowledge. This principle, at the core of Rudolf Steiner's pedagogy, has guided the institute's policies and programs since its foundation. For thirty years now, the institute has consistently refined this approach, meeting the ever-evolving needs of future teachers.

In spite of the great quality and value of its pedagogical services, the institute encounters regular and recurrent challenges in the pursuit of its mission. It is always surprising to consider the fact that schools, of their own acknowledgement, are



experiencing difficulties in recruiting trained teachers, often resorting to hire candidates with little or no training in Waldorf education. Yet they do not require them to complete or enroll in a formal and recognized Waldorf training. Training is often left to the better judgment and support of colleagues. This of course is not without consequence for the pedagogical quality of the schools; nonetheless they must go forward in this compromise because they regularly lack the financial resources to support their young teachers in their training. This situation is acknowledged also by the AWSNA who does not bindingly require from the schools that their teachers have completed formal training or be enrolled in an accredited Waldorf training. In respect to the urgency and necessity of many situations, good will and manifested intentions are perceived as positive first steps to amelioration.

These compromises also have a significant impact on the institute's ability to defend its culture of excellence and pedagogical standards, necessary for training proficient and dedicated teachers. The perception is that the institute's programs are often too demanding and time consuming. As a consequence enrollment at the institute is low, a paradox considering the great need.

In light of these challenges it has become a priority for the institute to engage in a three-way conversation with the schools and the AWSNA with the goal to establish efficient policies that guarantee accessibility, financial and temporal, for all teachers in position at the schools wishing to complete or start a formal Waldorf teacher education program.

C2. Priorities for future work

1. Develop enrollment. a) Engage the schools and the AWSNA in a conversation to create common policies that guarantee financial and temporal accessibility for teachers in service to complete their Waldorf teacher education. b) Consolidate



dialogue with the schools for developing projects and events of interest to their communities.

2. Consolidate board membership and documentation of policies and practices in the areas of governance structure, responsibility, authority and accountability, strategic planning, crisis and risk management, and conflict of interest.

3. Create new unified documents (e.g. Student Handbook, Faculty Handbook) gathering all existing documented policies and practices in the areas of Student support, Faculty and Staff support and articulated educational programs.

4. Develop fundraising activities.

5. Pursue the institute's commitment to the AWSNA accreditation process.

6. Pursue the institute's commitment to the WECAN accreditation process.

7. a) Create funds for an office space and secretarial work. b) Centralize files, archives and pedagogical materials.

8. Rebuild the website and increase the institute's social media presence.

9. Increase our efforts to develop efficient and constructive collaborations with all Anthroposophical initiatives in the province in respect to scheduling events of common interest.

C3. Summary of Self-Study Process

All of the institute's constituents have, in various degrees and instances, participated and engaged in this process of self-study. Throughout the past year, considerate thought and reflection has been given to the issues and areas of study identified in the AWSNA's document on Self-Study Structure and Guidelines for Waldorf Institutes. These themes have animated and nourished many fruitful meetings; it has inspired the institute in bringing greater transparency and visibility to its long established practices. In today's world, the need for readily accessible and clearly documented policies and practices is



something that the institute embraces unreservedly, because it is a growing factor for trust in our material, evidence-based culture.

The creation of the Self-Study Report has given the institute the opportunity to assess its current practices and identify the road ahead. It is a valuable document that will undoubtedly support and inform all future decisions and strategies at board and faculty meetings. Future members of the institute are also sure to profit from the process documented in these pages.

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