

# **MONTESSORI AUSTRALIA FOUNDATION**

## **SYSTEM CONSIDERATIONS**



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# **Background to the Development of Independent Schools and the Evolution of Systems**

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# **Government Accountability and Trends**


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Initially Systems were formed to suit the purposes of the System proponents.



- To secure their future
- To coordinate and develop common policies
- To control management and educational delivery
- To provide a platform for future development



With the evolution of financial subsidies (recurrent and capital funding) by governments to the independent school sector greater accountability has evolved.




- It came initially by simply reporting to governments
- It evolved to include reporting and statutory declaration
- It has continued evolvement to include analysis and public reporting
- It will continue to be more intrusive in the future



Most accountability has a reasonable base and is not overly intrusive. However, some is subjective and not entirely effective.



What we can be sure of is that accountability is here to stay and that Systems are on the whole better placed to answer to governments than stand alone schools.

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- Older, well established and larger stand-alone independent schools are better placed than newer and smaller stand-alone schools.
  - Governments are comfortable in dealing with Systems where they can see that Systems can influence sound governance, financial management and long term viability.



# **Independent Schools and System Relationships with Government**

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When Systems were first formalized governments had a distant relationship with them.



- Governments were content to let the Systems organize their schools and develop their management.
- System schools initially were little different to stand-alone schools except that their reporting to government was vetted by System administration.



As school Systems have evolved into stronger and very organized management bodies, so too the relationship with governments.

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- Catholic Systems are responsible for hundreds of schools, therefore governments have formed a strong relationship with them from a funding and management perspective.
  - Other Systems, such as the Lutheran System, have become more organized and centralized in policy development and management. This has lead to increasing contact with government.
  - Systems, not stand-alone schools, have the option of reporting or not reporting to the government for the Financial Health Assessment tests.

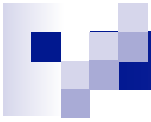


The evidence is clear.  
Governments and their  
bureaucracies are working closer  
with Systems in all facets of school  
management and reporting. This  
can only continue to strengthen in  
the future.



# **Considerations for Montessori Schools**

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<b>Item</b>	<b>Detail</b>
<b>Number of Schools</b>	<b>35</b>
<b>Number of Primary Students</b>	<b>2,877</b>
<b>Number of Secondary Students</b>	<b>139</b>
<b>SES Range</b>	<b>91 - 133</b>



The threat to your schools as individual stand-alone schools will come by stealth. This will mostly be unintended.



- Governments generally do not like small schools. They see these not easily meeting their perceived policy requirements and therefore as a greater risk.
- Policies are developed by governments that, without intention, discriminate against smaller, stand-alone schools.



Your vulnerability is:



- Partly your scattered locations
- Partly your individual size
- Partly any difficulty in meeting government accountability guidelines.



The benefits of a System will  
revolve around:



- How you can focus governments on the strength of your philosophy.
- How you can improve school management and reporting.
- How you can demonstrate to governments that Systemization will strengthen your viability.



# **Risk Management Issues**

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The growth in the number of schools is a testament to the acceptance of the philosophy of Montessori education.



Risk managements issues  
include:



- Your relationship as individual schools with government.
- Development of Montessori curriculum to match government requirement
- Viability of small school operations



- The politics of community control
- Individual schools “going their own way” in conflict with Montessori values and putting viability at risk.
- Changes in government policy without concern for individual schools.



- Sound governance according to set policies that match Montessori philosophy.
- The “brand” name.
- The effectiveness of an across Australia System.
- Relationships with independent school authorities and organizations.




# **Systems and AIS Relations**

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This is one of the vexing  
problems facing other  
Systems at the moment.

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- The Catholic School System is separate to the Association of Independent Schools in each State. However, some Catholic schools pay fees to both. These are mainly larger Religious Order Owned Schools.



- The Association of Independent Schools jealously guard their role and clearly see the evolution of Systems as a threat to their operation.



# Evolution - Timing

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In order to put a System in place you need to:



- Have a plan as a “blue –print” before you go forward.
- Consult widely with your schools.
- Be prepared for some resistance.
- Use common sense when developing your plan. Do not make it over complicated. Remember, once in place there is time for it to evolve.



# **Financial Implications and Cost**

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In order to have a properly structured System that is:




- Staffed by adequate administration officers
  - CEO
  - Business Manager
  - Administrative Staff
  - Specialist Support Staff
  - Rented Premises
  - Overhead Costs



You will need a budget to match the structure of the operation.

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- Your current budget indicates that you are budgeting for an income from MAF School Services Fees of \$195,000
    - This equates to \$65 per student

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- Catholic Systems have a levy system that relates to the socio-economic status of each school.
    - Schools with an SES in a band up to 100 pay less than schools with an SES in the band of 101 and above.
    - There are also fees depending on the size of the school



**The Catholic Systems are centralized.**



- They receive all government recurrent grants.
- They pay all wages of all staff at each of their schools
- They offer significant curriculum planning and support




- They monitor and approve budgets.
- They assist with financial planning.
- They negotiate with governments.
- They assist with the employment of staff.




The Lutheran Systems are less centralized.



- They receive all government funds but distribute them to their schools less 2% for administration.
- They fund their System from the 2% and levies charged to their schools.
- They monitor and approve budgets.
- They provide a level of curriculum planning and support.



It is my opinion that Systems should disburse all government funds to their schools and rely on a per student levy for their income. This way the cost of operating the System is very transparent and whilst schools are accountable to the System for governance and management, the System is accountable to the schools for the operation of the System from fees collected.



I will not recommend or suggest what a levy or fee should be to operate a System, other than to say that a figure in the range of \$200 to \$300 per student per annum would be a starting point (\$50 to \$75 per student per term). This is not excessive and could be structured into an SES model and scaled accordingly.



# **Educational Finance Services Pty Ltd**

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