Holywood Steiner School

Parents & Friends Association

Overarching Funding Policy

Charity No. 109115 • Registered with Parentkind

1. Who We Are

The Holywood Steiner School Parents & Friends Association (HSSPFA, 'the PFA') is a registered charity (NI Charity No. 109115) and a member of Parentkind. We are an independent body, distinct from the school and its board of trustees, governed by our own constitution and accountable to the Charity Commission for Northern Ireland.

Our registered charitable purposes are:

- To advance the education of pupils at Holywood Steiner School by developing effective relationships between staff, parents, and the wider community.
- To engage in activities or provide facilities and equipment that support the school and advance the education of its pupils.

We exist to enrich - not to subsidise. The PFA is not a funding body for the school's operational costs. Our role is to add value over and above what the school provides through its fees and grants, and to strengthen the bonds between families, staff, and the wider community.

2. Our Independence from the School

A key principle of this policy is that the PFA operates as an independent charitable organisation. We are not a fundraising arm of the school, and the school should not plan its budget on the assumption of PFA income.

Why this matters
As a registered charity, PFA funds must be used in accordance with our charitable purposes - not the school's financial needs.
Becoming a routine source of school income creates dependency, blurs accountability, and risks our charitable status.
Our independence allows us to advocate for pupils and families with an objective voice.

In practice this means:

- The PFA does not accept open-ended requests from the school to 'top up' budgets or cover shortfalls.
- All spending decisions are made by the PFA Committee, not by school staff or trustees.
- We will communicate proactively with the school about what we can and cannot fund, so expectations are managed clearly.
- Where a request sits within the school's own responsibilities - whether for staffing, facilities, or curriculum. We will decline and direct the school to find appropriate funding.

3. What We Fund

Every spending decision must pass a simple test before it is considered:

The Purpose Test
1. Does this directly benefit the children at Holywood Steiner School, or strengthen the relationship between families and the school?
2. Does it fall within our registered charitable purposes?
3. Is it something the school cannot or should not fund itself?
If the answer to any of these is 'no', the request will not proceed.

4. Priority Tiers

Where demand exceeds available funds, spending is prioritised in the following order. All requests are assessed within this framework.

Tier	Category	Examples	Approval level
1	**Pupil learning & experience**	Trips, classroom resources, equipment, materials that directly benefit children in school	*PFA Committee - highest priority*
2	**Parent–school relationship**	Community events, family gatherings, seasonal fairs, parent coffee mornings, welcome events	*PFA Committee*
3	**Staff development (partial)**	Waldorf-specific pedagogical training meeting full eligibility criteria under the Training Fund Policy	*PFA Committee - subject to Training Fund Policy and budget reserve*
4	**School infrastructure**	Equipment or facilities with clear, lasting benefit to pupils (e.g. sports equipment, defibrillator)	*PFA Committee - only where no alternative school funding exists*

Tier 1 is always the primary use of PFA funds. Tiers 2 - 4 are funded from what remains after Tier 1 commitments are met for the year.

5. Budget Reserves

At the start of each academic year, the PFA Committee will allocate the year's anticipated income across the following reserve funds. Requests are funded from the relevant reserve. Once a reserve is exhausted, no further requests from that category will be approved until the following year, unless the Committee votes to reallocate from the discretionary reserve.

Reserve fund	Purpose	Indicative allocation
Trips & Educational Visits	Pupil day/residential trips	25% of annual budget
Staff Training Fund	Waldorf-specific CPD (subject to Training Fund Policy)	10% of annual budget
Community & Events	Parent–school relationship activities	50% of annual budget
Equipment & Resources	Pupil-facing resources, infrastructure	10% of annual budget
Discretionary Reserve	Exceptional or unplanned requests approved by full Committee	5% of annual budget

Indicative allocations will be reviewed and confirmed at the AGM each year or when a majority of the PFA vote as such during an arranged meeting. The Committee may adjust proportions to reflect the school's current priorities and the PFA's fundraising performance.

6. Rotational Focus

To ensure all parts of the school benefit fairly over time, the PFA operates a rotational focus for discretionary and community spending. This does not affect Tier 1 (direct pupil benefit), which remains open to all year groups throughout.

Period	Focus area	Rationale / examples
2026–2027	Upper School (Classes 8-11)	Upper school will be this academic year's identified priority. Requests from this area will receive preferential consideration for discretionary spend above standard tier allocation.
Ongoing	All areas (Tier 1 baseline)	Rotation affects discretionary and events spend only. Tier 1 (direct pupil benefit) remains open to all year groups at all times.

The focus area for each coming year will be confirmed at the AGM or an arranged PFA Committee meeting, published to the school community, and noted in the Trustee Annual Report.

7. Automatic Decline Categories

The following categories of request will be declined without further discussion. This gives the Committee a clear and consistent basis for saying no, protects our charitable status, and sets clear expectations for requesters.

Automatic decline — category	Reason
Requests from the school as an institution	The PFA funds enrichment for pupils and families - not the school's operating costs. The school should not come to rely on PFA income to fund things within its normal responsibilities.
Staff salaries, bonuses, or expenses unrelated to training	These are employment matters for the school to manage, not a charitable purpose of the PFA.
Generic or non-Waldorf training with no clear school benefit	Training must meet the full criteria in the Staff Training Fund Policy. The school should fund training that is part of its core staffing responsibility.
Requests from staff in probation or without the required tenure	The Training Fund Policy sets clear eligibility thresholds; requests that fall below these are automatically ineligible.
Capital expenditure that should be met by the school	Building works, major infrastructure, or items that are the school's statutory responsibility fall outside the PFA's charitable purposes.
Requests that have already received funding from another source	The PFA will not top up grants, bursaries, or school-funded spend without exceptional justification.
Requests submitted after spending has already occurred	All funding must be approved before expenditure is incurred. Retrospective requests will not be considered.
Requests with no named pupil or community benefit	Every funded activity must have a clear, demonstrable benefit to children at the school or to the parent–school relationship. Requests that cannot articulate this will not be approved.

Where a request falls into one of these categories, the Committee Chair or Treasurer will notify the requester in writing, briefly explaining the reason. Requesters are not entitled to appeal automatic declines, though they may resubmit if their request is materially different.

8. Staff Training - Special Provisions

The PFA recognises that well-trained staff, particularly those deepening their Waldorf pedagogy, enrich the education of every child in the school. However, the PFA cannot and should not be expected to fund all staff training.

The following principles apply:

- Staff training is funded from the Staff Training Fund reserve only, subject to the separate Staff Training Fund Policy.
- The school is expected to contribute to staff development as part of its employment responsibilities. The PFA's role is supplementary, not primary.
- Where the school approaches the PFA with a training request, the Committee will ask: why is the school not funding this? If no satisfactory answer is given, the request will be declined.
- The Committee will actively manage the volume of training requests and may set a maximum number of funded training places per academic year.

Guidance for pushback on training requests
If a request does not meet the eligibility criteria in the Training Fund Policy, cite the specific criterion and decline.
If the training is not Waldorf-specific, ask the school to explain the pedagogical relevance before proceeding.
If the annual training reserve is exhausted, the request is deferred - not declined - to the following year.
If the school is requesting training for a member of staff it could reasonably fund itself, decline and note that the PFA's funds are reserved for enrichment above the school's core responsibilities.

9. How Decisions Are Made

All funding decisions follow this process:

1	Request submitted in writing using the relevant application form, before any expenditure is incurred.
2	Request reviewed by Treasurer against the Purpose Test (Section 3) and the relevant tier and reserve.
3	If an automatic decline criterion applies (Section 7), the Treasurer notifies the requester and the request goes no further.
4	Eligible requests are presented at the next PFA Committee meeting (or by email vote if time-sensitive).
5	Committee votes to approve, defer, or decline. A simple majority is required; the Chair holds a casting vote.
6	Requester is notified of the outcome in writing within 5 working days of the decision.
7	Approved funds are released according to the payment terms in the relevant policy (e.g. staged payments for training).
8	The Treasurer maintains a record of all decisions, expenditure, and the reserve balances, reported to the Committee at each meeting.

10. Transparency & Reporting

- The Committee will publish a summary of all funded activity to the school community once per term.
- Reserve balances will be shared with the school's board of trustees annually so that the school understands the PFA's capacity and plans accordingly.
- The annual Trustee Annual Report (submitted to CCNI) will include a narrative account of how funds were spent and how this served our charitable purposes.
- Any request from a trustee's own family or involving a conflict of interest must be declared; the relevant trustee will withdraw from the decision.

11. Policy Review

This policy will be reviewed annually at the PFA AGM or an arranged PFA Committee meeting. Between reviews, the Committee may make minor amendments by majority vote, which must be recorded in the minutes and communicated to the school community.

Policy Version: 1.0	Date Adopted: __30.9.26_____	Next Review: ____30.9.27_____