

5 Year Strategic Plan - 2023

Vision: *A thriving community who is passionate about learning, discovery, and making a positive impact in the world.*

Mission: *The Montessori School of Champaign Urbana stimulates the natural curiosity of children through hands-on prepared environments to be self-directed, compassionate, innovative thinkers.*

Executive Summary

This document is created based on discussions at the Board retreat in Fall 2022, as well as multiple meetings between the executive committee and the HoS. The committee performed SWOT analysis, identified objectives for the next five years, and organized them on a timeline. This report describes the SWOT analysis, followed by the objectives. Each action item is assigned a date due and an owner who is responsible for ensuring and reporting on completion.

The **key components** of the 5-year plan:

1. Secure additional facilities near the MSCU site
 - a. Add one classroom each to lower elementary and upper elementary
 - b. Expand extracurricular options
2. Do not restart the secondary program, so the school can focus on strengthening the elementary program, stabilizing leadership, and improving processes
3. Hire a permanent Head of School
4. Improve communication with parents
 - a. Improve accuracy and completeness of website
 - b. Establish regular parent education nights
5. Establish an alumni base for community and fundraising
 - a. Increase financial aid availability
6. Continue to improve record keeping and documentation of processes in maintenance, finances, employee and Board training, and other areas
7. Establish and document internal review processes for the school's programs, administration, and the Board
8. Seek accreditation as a mechanism for further reviewing and improving practices across MSCU

The five year plan must be reviewed and updated annually to remain relevant, with more detailed objectives specified for the subsequent year.

SWOT Analysis

<p><u>STRENGTHS</u></p> <ul style="list-style-type: none"> • Longevity • Location: Urbana and Champaign • Volume of alumni • Montessori specific education • Tenure/experience of teachers • Community fostering: like-minded community values • Reputation of primary program • Good relationship between board and staff 	<p><u>WEAKNESSES</u></p> <ul style="list-style-type: none"> • Limited facilities • High administrative (esp HoS) turnover • Loss of institutional knowledge • Board turnover- transfer of historical and working knowledge • Loss of innovation/adaptability • Secondary program non-functioning • Lack of parent education of Montessori method • Inaccurate/incomplete web communication • Lack of marketing/visibility in CU advertisements • No alumni database • Covid changing parent presence in the buildings/observation window • Lack of extracurriculars
<p><u>OPPORTUNITIES</u></p> <ul style="list-style-type: none"> • Regency available for purchase • Cash reserves • Chaos in Urbana/Champaign public elementary • Large local alumni pool • University of Illinois College of Education/ Golden Apple Program pipeline of new teachers that are montessori trained • University of Illinois Gies School of Business experiential learning program • No montessori high school in CU area • Extracurricular activities- ASL, music, art, chess, ballet (starting Jan 2023), language 	<p><u>THREATS</u></p> <ul style="list-style-type: none"> • Older teachers may phase out same time • Facilities aging • Size of facilities verses needs • Complete reliance on tuition for income

Most centrally, the limited capacity of current facilities and uncertainty about the secondary program have made planning difficult, especially in light of administrative and board turnover. *This analysis leads to a critical objective of providing space for the school to improve and slightly expand its programs, without losing the core strengths of location and the foundation of a stable community and without creating instability or risking financial ruin.*

Programs

Focus on improving and expanding its elementary programs, with no plans to re-establish a secondary program in the next five years.

The school is not yet ready to add a secondary program. The elementary program is budding and needs time to stabilize and reach its potential. The school is also not ready administratively for a new program. Processes are still being improved, search for head of school is underway, governing policies drafted and implemented, and a framework for a long-lasting positive relationship between the Board and administration and staff is being constructed. Therefore, creation of a secondary program is excluded from the five year plan.

If the school successfully expands the footprint of the Savoy campus, its primary objective is to improve programs, for example restoring extracurricular programs and providing adequate space for aftercare and other activities. A slight expansion is also planned, from two lower elementary classrooms to three (40 to 75 children) and from one upper elementary classroom to two (from 20 to 43 children). This change is summarized below.

CURRENT ACADEMIC PROGRAM STRUCTURE & CAPACITY

Program Name	Grade Level (or Age)	Max # of students per class	# of classroom (s)	Total # of students per program	# of Directress/ Director per class	Total # of Assistants
Toddler	24 – 36 mos	15	1	15	1	3
Primary	Preschool & Kindergarten (3-6y.o.)	20	5	100	1	5
Lower Elementary	1 st – 3 rd grade	40	1	40	1; +1 in training directress; +1 certified teacher	1 reading and special ed. specialist
Upper Elementary	4 th – 6 th grade	20	1	20	1; +2 in training directresses	

5-YEAR ACADEMIC PROGRAM STRUCTURE & CAPACITY

Program	Ages	Max # of students per class	Max # of classroom(s)	Total # of students per program	# of Directress or Director per class	# of Assistants per class
Toddler	20 mos to 36 mos	15	1	15	1	2
Primary	3 - 6 yo Preschool/Kindergarten	21	5	105	1	1
Lower Elementary	1 st – 3 rd grade	25	3	75	1	1
Upper Elementary	4 th – 6 th grade	25	2	43	1	1 between two classes

Besides the program structure and classroom size, the aim is to improve, expand, and/or formalize the offerings for extracurricular activities, which could include sports, music, arts, or technology.

Description	Own	Due	Cmp
Extracurricular			
Provide at least two options for after school extracurricular activities for ages 5+	HoS	28-05	
Perform a Family Educational Needs assessment to determine if school should expand or modify offerings	HoS	28-05	

Facilities

Purchase a new building on or near Savoy campus, and improve maintenance record-keeping.

Description	Own	Due	Cmp
Facilities			
Purchase building for elementary near Savoy location	Real	24-05	
Maintenance			
Create maintenance schedules and checklist for each building	Phys	24-05	
Create annual maintenance and inspection schedule for playgrounds	Phys	24-05	
Create catalog of warranties and contacts to be stored in main office	HoS	24-05	

Communications

Improve digital communication online through more shared and accessible information. MSCU provides information to parents on a regular basis through weekly school updates and classroom communications. Over the next five years, the main aims to improve communication are: to provide more timely, accurate, and complete information on the MSCU website; to provide a greater understanding of the Montessori method and the school's programs through parent education nights; and to establish a marketing plan.

Description	Own	Due	Cmp
Website			
Put processes in place to check/update directory, bios, and other general information every three months. It should be easy to see all staff associated with each classroom.	HoS	23-08	
Add monthly calendar of events (board meetings, school events-fundraisers, volunteering opportunities for grounds, start/end school gatherings)	HoS	24-05	
Add/update fundraising page with donation link	Fund.	24-05	
Add all of our current MSCU society Bylaws, policies, and procedures from board, to school, to employee operations, and minutes into the website via google documents.	Gov.	23-08	
Add alumni page	Fund.	25-05	
Integrate into Board Policy Online platform to provide all policies, procedures, & bylaws digitally (board, to school, to employee operations), e.g. https://boardpolicyonline.com/?b=champaign	Gov.	25-05	

Parent Education			
Conduct parent education nights (at least two per year) to increase awareness of program/curriculum and build community	HoS	23-12	
Assign dedicated staff member to organize and run parent education nights	HoS	24-08	
Marketing			
Develop a marketing plan, use established budget for annual cost to implement	HoS	24-05	

Alumni and Fundraising

Establish a database and regular communications/events with alumni to build community and raise funds. MSCU has a rich history with thousands of alumni, including many who are now adults living in the community. By strengthening relationships with alumni, MSCU can build community, foster connections between alumni and current students and families, and raise funds from beneficiaries of the school who are no longer paying tuition. Establishing a larger donation stream would enable increased financial aid and facility improvements services that would not otherwise be possible.

Description	Own	Due	Cmp
Alumni			
Establish alumni committee or expand scope of fundraising committee to include alumni relations	Exec	24-08	
Create and assign duty to maintain alumni donor base	Fund	25-05	
Hold annual alumni event	HoS	25-08	
General Fundraising			
Set up mechanisms for donations through website and/or newsletter QR codes, etc.	Fund	26-05	
Create quarterly newsletter, including request for donations	HoS / Fund	26-05	

Training and Professional Development

Continue and improve training processes. MSCU has an established practice of providing internal and external training opportunities for staff and directors/directresses. These objectives aim to further encourage and broaden participation and areas of training. The Board of Directors does not yet have a procedure for onboarding, which is to be addressed in the first year.

Description	Own	Due	Cmp
Staff Training and Development			
Hire a Special Education consultant to train staff, observe classrooms to provide recommendations to directors/directresses to better serve students who may otherwise have a 504 Plan or IEP in Public School setting, and meet with parents as needed.	HoS	24-08	
Create plan for annual or biennial Montessori training for Directress/Directors	HoS	24-05	
Create plan for annual Montessori training and/or certification for aides	HoS	24-05	
HoS attends Montessori society meeting every 2 years, including in 2023/2024 year	HoS	24-05	
Provide annual inclusivity focused training for all staff (i.e., unconscious bias, work group dynamics, etc.)	HoS	24-05	
Partner with College of Education UIUC or Eastern Illinois University to begin welcoming student teachers into montessori classrooms	Exec	28-05	
Board of Directors Training			
Create process and documents for annual onboarding of new Board members	Gov/ Exec	24-05	
Create board training manual / tutorial	Gov/ Exec	26-05	

Financial Management, Aid, and Grants

Take advantage of grant opportunities, refine financial processes, increase availability of financial aid, and maintain a 3-4 month cash balance. In the past two years, the school's financial situation has improved considerably, due to receipts from grants and improved tuition tracking and collection. We would like to assign a staff member with responsibility for finding and securing grants. We would also like to further improve the organization of financial records and

hire a third party to review our processes and suggest areas for improvement. We would like to make financial aid more widely available, for students joining mid-year, and to allocate more funds to financial aid. This objective is tied to efforts to establish an alumni and donor base, as we can increase our financial aid budget if we are able to improve in fundraising. We currently have a large cash reserve. We expect to spend a significant portion of that reserve on new facilities. In steady-state, our goal is to maintain an account balance sufficient to pay expenses for three months during the school year. Any funds in excess of four months of expenses can be used to pay down the mortgage.

Description	Own	Due	Cmp
Grants			
Task staff member with seeking grants for renovation, operations, non-profit education	HoS	26-05	
Financial Procedures and Records			
Solicit bi-annual review of financial procedures and recordkeeping by external firm or consultant	Finan	25-05	
Maintain all key financial records digitally, including timesheets and statements, in a Google drive or other shareable location	HoS	26-05	
Financial Aid			
Establish a midyear procedure for financial aid funding for new students joining MSCU in January	HoS	23-12	
Provide 1% of tuition through financial aid	Finan	23-08	
Provide 2% of tuition through financial aid	Finan	24-08	
Provide 3% of tuition through financial aid	Finan	25-08	
Provide 4% of tuition through financial aid	Finan	26-08	
Provide 5% of tuition through financial aid	Finan	27-08	
Cash Management Guidelines			
Maintain at least 3 months of operating expenses in primary bank account	Finan		
If bank account funds exceed 4 months of operating expenses, use remainder to pay down mortgages	Finan		

Governance and Review

Establish well-documented, repeatable processes for continual review and improvement, and seek AMS accreditation. In recent years, the Board and MSCU have made many improvements to the policy and guideline documentation. The goal in the next five years is to further formalize and document processes for internal evaluation, and to seek AMS accreditation as a driver for further improvement. We also aim to establish a committee tasked with improving understanding and representation of parents' concerns.

Description	Own	Due	Cmp
Internal Review			
Evaluate MSCU administrative staffing and headcount in comparison with comparably sized schools with similar programs	Exec	26-05	
Document annual review processes, forms, and metrics for HoS, Board, and MSCU	Exec	26-05	
Establish a Montessori Community Committee for parent- school Community relationship building, general school communications, and liaison with the Board in order to delineate and separate Board fiduciary responsibility for school oversight and HoS management from general Montessori family-school concerns	Exec	26-05	
Establish process for annual internal classroom assessments	HoS	26-05	
Accreditation			
Review AMS accreditation standards and identify areas that need attention to meet the standards. Incorporate into an updated 5-year plan.	HoS / Exec	24-05	
External evaluation of classrooms by AMS consultant, potentially as part of accreditation process	HoS	26-05	
Document and publish learning objectives within each classroom, consistent with AMS accreditation standards	HoS	26-05	
Achieve AMS accreditation	HoS	28-05	

Review and Update Five Year Plan

Commit to making the five-year plan a living document to guide short-term actions to be directed toward long-term strategic goals. This five year plan documents the short and long-term objectives based on what we know now, in March 2023. Keeping the plan relevant will require regular review and revision, and more detailed objectives should be provided for each upcoming year.

Description	Own	Due	Cmp
Review and Update Five Year Plan			
Annually, update when objectives are met or discarded	Exec	24-05	
Annually, update due dates and add detailed objectives for following year	Exec	24-05	
Every two years, update 3 year and 5 year strategic directions	Exec	26-05	