Methods Used to Develop the Strategic Plan

Clementine Montessori School (CMS) surveyed parents, faculty, and board members to help identify school priorities and to obtain feedback on their performance as a school. Approximately 49 respondents answered questions about the overall culture of CMS, the performance of teachers and administrators, the facility, and board engagement. The survey included a Strengths, Weaknesses, Opportunities, and Threats analysis (SWOT) framework to obtain input on areas where CMS is doing well and where CMS can improve, as well as to assess potential growth opportunities and possible threats to the school’s success.

CMS is committed to a collaborative and inclusive process, so they surveyed as many stakeholders as possible to ensure that the final plan is stakeholder-driven and includes both short- and long-term goals to enhance its capacity to serve its students and faculty and to broaden its impact within the larger Montessori community. The information gathered from the survey provided context for the Board’s strategic planning retreat and resulted in a strategic plan that will guide the school’s program priorities, development activities, facility planning, and capacity-building initiatives over the next three years.

Summary of Survey Results

1. The school has strong administrative leadership and quality teachers.
2. The staff at Clementine are exceptional and care deeply about their work.
3. Parents feel treated with respect and feel welcome by CMS staff.
4. The Montessori environment is authentic, child-centered and focused the whole child.
5. Teachers feel they are treated with respect and feel the head of school has confidence in them.
6. The school building, grounds, and overall facility need improvement.
7. CMS would benefit from more socio-economic diversity.
8. Financial aid and expanding the school’s footprint should be among the Board’s priorities.
9. Fewer gaps in care, including child care during meetings and backup care during closures, would make the school more accessible to parents.
10. The school should offer more professional development opportunities for teachers.

Mission Statement

Clementine Montessori School (CMS) nurtures children to become confident, capable contributors in a diverse and ever-changing world. Founded in the philosophy of Dr. Maria Montessori, we inspire children to explore the world, appreciate differences, and embrace challenges. We recognize the uniqueness of each child, seek out the opportunities of our urban setting, and cultivate independence, social responsibility, environmental stewardship, and global citizenship.
Strategic Priority 1: Faculty and Staff. Attract, retain and develop a diverse, outstanding team of educators and administrators who continue to advance Clementine’s excellence in Montessori education.

**Goal 1:** Continue to build the organizational infrastructure to support faculty and staff.

**Objective 1:** Create and maintain a Faculty and Staff Committee to support the development of strategic staffing priorities. (Years 1-3)

*Tactics:*
- Identify board members to serve on committee.
- Recruit additional non-board members to serve on committee, as needed.
- Plan for committee to address teachers at the beginning of each new school year.
- Obtain feedback from faculty and staff on at least a quarterly basis.
- Establish procedures for semi-annual one-on-one check-in meetings between head of school and staff, with head of school reporting on those meetings to the board.
- Establish procedures for semi-annual evaluation of head of school.

**Objective 2:** Establish clear, consistent policies for faculty and staff that foster school cohesion. (Years 1-3)

*Tactics:*
- Develop employee handbook in advance of the 2018-2019 school year.
- Update handbook annually before the start of the school year based on feedback from Faculty and Staff Committee discussions.

**Goal 2:** Develop a comprehensive compensation package for faculty and staff, including a professional development and evaluation program, that meets their needs at all stages of their careers.

**Objective 1:** Expand professional development opportunities. (Year 1)

*Tactics:*
- Review current budget for staff development.
- Restructure and/or increase budget as needed based on faculty and staff feedback.
- Maintain professional working relationships with local Montessori schools in order to create reciprocal observation opportunities.
- Individually survey faculty and staff about what local and national opportunities they feel benefit them most.
- Complete a regional salary survey.

**Objective 2:** Identify ongoing professional development and growth opportunities for faculty and staff. (Years 1-3)

*Tactics:*
- Assess ways to offer career growth within existing positions to promote staff retention.
- Determine opportunities for professional development and increased job satisfaction.
- Attend local conferences.
- Create training series for CMS faculty to offer training or continuing education to peers.
• Expand opportunities for CMS faculty to attend and present at Montessori conferences.

**Goal 3:** Build and maintain Clementine’s position in local teacher’s market as an authentically Montessori preschool in order to attract diverse talent. (Years 1-3)

**Objective 1:** Ensure diversity is a priority in faculty and staff recruiting and training. (Years 1-3)

**Tactics:**
- Identify mechanisms for increasing diverse pool of applicants.
- Consider exploring the methods of area private schools that have successfully achieved a high level of faculty diversity.
- Ensure all staff regularly complete anti-racism and other diversity training to build their skills and competencies.

**Strategic Priority 2:** Students and Families. Continue to grow an inclusive environment that welcomes students and families through a strong communications culture and an expanded civic footprint.

**Goal 1:** Build a diverse community of learners in order to achieve the mission of CMS and Dr. Maria Montessori.

**Objective 1:** Define diversity benchmarks. (Year 1)

**Tactics:**
- Create exploratory committee on diversity and inclusion initiatives.
- Determine what diversity looks like, e.g., socio-economic or racial diversity.
- Develop diversity outcomes and communicate progress toward those outcomes.

**Objective 2:** Develop and promote clear, compelling intentional language about Clementine’s commitment to diversity. (Year 1)

**Tactics:**
- Focus Year 1 board retreat on developing diversity statement.
- Include diversity statement on website and all marketing and admissions materials.

**Objective 3:** Align marketing, outreach, and admissions activities with strategic diversity goals. (Years 1-3)

**Tactics:**
- Develop diversity priorities to guide admissions activities in advance of recruitment cycle.
- Meet with Admissions Director annually to ensure diversity goals are understood and can be executed.
- Market and recruit among professional and social organizations of color.
- Advertise in journals or publications that target audiences of color.
- Host tables at local festivals and events.

**Objective 4:** Explore options to increase diversity. (Years 1-3)

**Tactics:**
- Determine feasibility of opening summer camp to non-CMS students.
- Create exploratory committee to research tuition and other subsidies as path to
• Explore increasing school-based financial aid.
• Explore long-term need for contract development position.

Goal 2: Offer activities that foster inclusion and shared knowledge across all members of the Clementine community.

Objective 1: Provide ongoing parent education to foster an inclusive environment. (Years 1-3)

Tactics:
• Offer classes and trainings to assist families in practicing Montessori principles at home.
• Identify opportunities and areas where parents can contribute to the school.

Objective 2: Make accommodations for all families to attend and participate in school activities; provide coverage during after-school events and school closings. (Years 1-3)

Tactics:
• Create more convenient meeting times.
• Partner with Philly Art Center and local businesses who offer classes for children ages 3-6 for childcare support.
• Hire substitute teachers for vacation care.
• Pay CMS teachers to provide childcare for after-school events.

Goal 3: Regularly assess parents’ satisfaction with CMS. (Years 1-3)

Objective 1: Create system for parents to engage in consistent and direct communication with board members. (Year 1)

Tactics:
• Establish dedicated email address for parents to use for communicating with the board.

Objective 2: Annually assess Clementine Montessori School Parents Association’s (CMSPA) effectiveness in promoting student and family inclusion (Years 1-3)

Tactics:
• Develop and maintain board structure to conduct annual individual meetings with CMSPA members.
• Incorporate assessment of CMSPA into annual community survey.

Strategic Priority 3: Facility Planning and Improvements. Establish and maintain a thriving physical school environment that fosters a rich Montessori experience.

Goal 1: Enhance the classroom environments and community spaces to better promote student learning and the goals of Montessori education.

Objective 1: Promptly implement short-term maintenance priorities. (Years 1-3)

Tactics:
• Seek teacher input on classroom improvements on an annual basis.
• Create supplies budget for teachers and inform them of new budget process.

Objective 2: Implement classroom enhancements, safety upgrades, and improvements to the
outdoor space. (Years 1-3)

Tactics:
- Continue to enhance building safety.
- Address building issues to ensure compliance with accreditation.
- Work with church to address concerns about the courtyard and the outdoor space, including installing planting beds, a roof canopy, and other shade solutions.
- Expand fence line, green the area, and wall off the area with landscape.
- Develop process for reviewing and assessing how to fund facilities improvements.

**Goal 2:** Evaluate options to better optimize current facilities and acquire additional space to serve more families and students.

**Objective 1:** Conduct feasibility assessment (code/building assessment and pricing exercise) to determine capacity for renovations, classroom increases and enhancements, relocation and possible expansion to serve more families. (Year 1)

Tactics:
- Create board task force team to conduct the feasibility assessment.
- Determine timeline and construction budget for expanding former Room 3 into additional available space.

**Objective 2:** Engage church as a potential partner in school’s growth. (Years 1-3)

Tactics:
- Conduct quarterly meetings with the church to continue dialogue on growth and expansion (costs, improvement of outdoor space, and other repairs), and partnership opportunities (food drive and other community building events).
- Maintain a flexible lease arrangement that allows room for space increases as the school grows.

**Goal 3:** Build and maintain a sound financial base.

**Objective 1:** Continue to build operating reserve to support facilities and other school needs. (Years 1-3)

**Strategic Priority 4:** **Board Governance.** Strengthen board capacity to guide and lead the Clementine community.

**Goal 1:** Maximize board impact by regularly assessing, developing, and streamlining board operations.

**Objective 1:** Conduct board governance assessment to review existing board structure and policies. (Years 1-3)

Tactics:
- Review and revise bylaws.
- Establish board policies and compliance goals.
- Create an organizational chart that defines the role of the board as it relates to staff and executive management.
- Hold annual board retreats.
Objective 2: Institute ongoing board development by recruiting new members to fill board vacancies, fine-tuning the onboarding process, and defining board roles. (Years 1-3)

Tactics:
- Develop a set of criteria for assessing board needs: define ideal board member profile and determine the skills gaps that need to be filled to ensure the right mix of talent and expertise on the board.
- Clearly define board committee roles that align with strategic plan priorities and fill board committee vacancies.
- Recruit non-board parents, parents of alumni, and community members to join the board and/or a committee to work on school priorities.
- Develop a process for vetting potential board members, engaging them in board activities, and orienting them to board operations.
- Utilize non-board committee assignments as a training ground for future board members.
- Include a parent from each classroom to serve on the Board Nominating Committee.
- Add school history, board member headshots, and member bios to the school’s website.
- Create board handbook and confirm review by member signatures.

Objective 3: Create system for more effective and strategic board meetings, including building the committee structure, scheduling committee meetings prior to the start of the school year, updating and reformatting meeting materials, and communicating board activities. (Year 1)

Tactics:
- Committee meetings will be held monthly in advance of regular board meetings; committee chairs will present reports at the general meeting.
- Meeting agendas will be strategy-oriented, with line items taken from the strategic plan priorities and focused on long term goals and intermediate steps for the Board to identify and implement.
- Consider holding public board meetings to promote transparency and to raise awareness of board activities.
- Draft communications, e.g. message from Board Chair, announcing important news and monthly updates via email blast; host a welcome page on the school’s website.
- Host annual “State of the School” meeting to share progress in meeting strategic planning goals and to inform the school community of board initiatives.
- Draft annual report or progress report with dashboard of school growth and benchmarks achieved.

Objective 4: Conduct annual board evaluations and ensure staggered thoughtful board growth for continuity. (Years 1-3)

Tactics:
- Design board evaluation tool to annually assess, develop, and monitor the board.
- Ensure evaluation process is based on strategic plan goals, specifically those set forth at the beginning of the school year.
- Establish staggered but regularly occurring board terms to ensure continuity, member renewal, and to preserve institutional knowledge.

Strategic Priority 5: Maintain and enhance our educational program strength as an authentically Montessori primary program.

Goal 1: Continue to enhance our core primary and kindergarten program
Objective 1: Increase kindergarten retention.

Goal 2: Obtain American Montessori Society (AMS) accreditation.