

# Greene Towne Montessori

## Strategic Plan Summary

(October 26, 2015)

### **Statement of Commitment:**

The Board is committed to this strategic plan, to the strategic financial plan and to due diligence. We commit to organize our Board / Board committees annually so as to effectively execute the plan with distinction. We will review the plan annually. [Implementation Year: October 26, 2015 onward].

### Contents

BOARD/GOVERNANCE .....	2
COMMUNICATION / PARENT RELATIONS.....	3
DEVELOPMENT & FUNDRAISING .....	4
ENROLLMENT & MARKETING .....	5
FACILITIES.....	6
FINANCES .....	7
PERSONNEL.....	8

**BOARD/GOVERNANCE** - The Board is responsible to make fiduciary decisions for the next generation of students. It is responsible to create and implement the strategic plan/strategic financial plan. All board decisions are mission-driven. The board insures operational excellence through its Head of School.

#### **CURRENT YEAR (2015-2016) : Board -- Governance Committee Tasks**

- Consider revising the school’s mission statement.** Ensure that it is clear and concise and draws attention to those characteristics that make the school distinctive and valued by the parents, students, faculty, and staff. **[Responsible Party: Governance Committee]**
- Review committee structure and role of each committee. Write charges for each committee that are both explicit and strategic-plan-relevant. Develop fully functioning and populated board committees. Expand the involvement of non-board parents and alums. Develop and implement a meaningful board evaluation process that is based on the fulfillment of the annual Board agenda. **[Responsible Person/Entity: Governance Committee].**
- Utilize the *ISM Strategic Board Assessment* instrument annually as a basis for ongoing board development; craft a fresh board profile to ensure a more diverse board. **(Responsible Entity; Governance Committee]**
- Provide ongoing trustee education for new and continuing board members. Provide training in fundraising, cultivation and stewardship. Ensure depth of leadership on the board and plan for board leadership succession. **[Responsible Person/Entity: Governance Committee].**

#### **YEAR 1-2: School Administration & Governance Committee Tasks**

- Create a *Portrait of the Graduate (Greenetowner)* that describes the “product” – the student who develops over the years that she/he is with your faculty. **[Responsible Party: Board & Administration]**
- Create *Characteristics of Professional Excellence* that focus on the specific behaviors, values and attitudes that are present in strength within the faculty that enables them to deliver the mission with excellence. **[Responsible Party: Board & Administration]**
- Utilize the *ISM Strategic Board Assessment* instrument annually as a basis for ongoing board development; craft a fresh board profile to ensure a more diverse board. **[Responsible Party: Governance Committee].**
- Provide ongoing trustee education for new and continuing board members. Provide training in fundraising, cultivation and stewardship. Ensure depth of leadership on the board and plan for board leadership succession. **[Responsible Party: Governance Committee]**

#### **YEARS 3- 5 School Administration & Governance Committee Tasks**

- Utilize the *ISM Strategic Board Assessment* instrument annually as a basis for ongoing board development; craft a fresh board profile to ensure a more diverse board. **[Responsible Party: Governance Committee]**
- Provide ongoing trustee education for new and continuing board members. Provide training in fundraising, cultivation and stewardship. Ensure depth of leadership on the board and plan for board leadership succession. **[Responsible Person/Entity: Governance Committee].**

**COMMUNICATION / PARENT RELATIONS** – There are children from 151 families enrolled at Greene Towne Montessori. Current parents seem to be satisfied and enthused about the value of the education their child (ren)'s is/are receiving. They are extremely likely to recommend the school to another family.

**CURRENT YEAR: School Administration Tasks**

- Appoint a taskforce to carefully study and consider the 2015 ISM Parent Survey results. Build a Parent Education Plan to enhance communications between current parents and the school. **[Responsible Person/Entity: Administration].**
- Create a taskforce to explore the role of digital communication for parents, faculty, and staff now and into the future. **[Responsible Person/Entity: Administration].**
- Rejuvenate the website [www.gtms.org](http://www.gtms.org). This is often the first contact a family has with the school. It needs to be user friendly, informative, inviting and instructive. **[Responsible Person/Entity: Administration].**

**YEAR 2: School Administration Tasks**

- Conduct a Communications/Technology Audit to identify the strengths and weaknesses of current internal and external communications. Identify what constituencies (especially parents) currently know about the school, what they need and want to know, and how they prefer to be reached. **[Revenue Source: operating budget; Responsible Person/Entity: Administration].**

**DEVELOPMENT & FUNDRAISING** – Greene Towne Montessori hired its first Director of Development in 2015. As a Montessori school for children ages 18 months through kindergarten, Green Towne has struggled with fundraising over the years. With their 50<sup>th</sup> anniversary in 2016-2017, the school is focused on both “friend-raising” and fundraising for enhancements as determined by the board.

**CURRENT YEAR: Board- Development Committee & Administration Tasks**

- Capitalize on the 50<sup>th</sup> anniversary opportunities for both “fund” and “friend” raising. **[Responsible Person/Entity: Board & Administration].**
- Create Alum Relations Task Force to find, educate, engage and cultivate alums. Initiate an Alum Newsletter focused on the 50<sup>th</sup> Anniversary celebrations. **Responsible Person/Entity: Administration].**
- Significantly increase Annual Giving (parents, alums, and friends) over the life of the plan. **[Responsible Person/Entity: Board & Administration].**

**YEAR 1: Board & Administration Tasks**

- Develop budget and multi-year plan for the Development Office. **[Revenue Source: operating budget; Responsible Person/Entity: Board & Administration].**
- Capitalize on the 50<sup>th</sup> anniversary opportunities for both “fund” and “friend” raising. **[Responsible Person/Entity: Board & Administration].**
- Create Alum Relations Task Force to find, educate, engage and cultivate alums. Initiate an Alum Newsletter focused on the 50<sup>th</sup> Anniversary celebrations. **[Responsible Person/Entity: Administration].**
- Significantly increase Annual Giving (parents, alums, and friends) over the life of the plan. **[Responsible Person/Entity: Board & Administration].**

**YEAR 2: Board & Administration Tasks**

- Capitalize on the 50<sup>th</sup> anniversary opportunities for both “fund” and “friend” raising. **[Responsible Person/Entity: Board & Administration].**
- Significantly increase Annual Giving (parents, alums, and friends) over the life of the plan. **[Responsible Person/Entity: Board & Administration].**
- Build Major Gifts and Bequests program. **[Responsible Person/Entity: Administration & Board].**

**YEARS 3-5 Board & Administration Tasks**

- Significantly increase Annual Giving (parents, alums, and friends) over the life of the plan. **[Responsible Person/Entity: Board & Administration].**
- Build Major Gifts and Bequests program. **[Responsible Person/Entity: Administration & Board].**

**ENROLLMENT & MARKETING** – The school’s marketing program needs to exemplify the richness of Montessori education and ensure that Greene Towne Montessori is the first choice for early childhood education for educators and parents in the center city of Philadelphia. The school currently holds an excellent reputation.

**CURRENT YEAR (2015-2016) Board & Administration Tasks**

- Establish consistent messaging and educate all constituencies regarding Montessori education. Draft and circulate a comprehensive plan that gives a greater understanding of the value of a Montessori education. **[Responsible Person/Entity: Administration].**

**YEAR 1: Board & Administration Tasks**

- Review financial aid/tuition remission policy. Consider increasing budget to enhance socio-economic diversity. **[Revenue Source: operating budget; Responsible Person/Entity: Board & Administration].**
- Establish consistent messaging and educate all constituencies regarding Montessori education. Draft and circulate a comprehensive plan that gives a greater understanding of the value of a Montessori education. **[Responsible Person/Entity: Administration].**
- Work with the faculty/staff to develop and implement a strong internal marketing plan that affirms for parents/ students/ families that the decision they made to attend Greene Towne Montessori was an excellent decision. **[Responsible Person/Entity: Administration].**

**YEAR 2: Board & Administration Tasks**

- Review financial aid/tuition remission policy. Consider increasing budget to enhance socio-economic diversity. **[Revenue Source: operating budget; Responsible Person/Entity: Board & Administration].**

**YEAR 3: Board & Administration Tasks**

- Conduct a demographic audit of the Center City/Logan Square area of Philadelphia in order to project future candidate pool. **[Revenue Source: operating budget; Responsible Person/Entity: Board & Administration].**

**FACILITIES** – Greene Towne Montessori currently occupies two spaces in the Logan Square area of Philadelphia. The east campus is owned by the school and provides space for the older students and administrative offices. The East campus is owned by the school and provides space for 4 classrooms of Primary School Year children and administrative offices. The West campus (20 year lease) is about 2 blocks away and provides space for the 2 classrooms of Toddler School Year children, 1 classroom of Toddler School Year/All Year ADM, 1 classroom of Primary School Year/All Year ADM, and Advancement and Development offices.

**YEAR 1: Board – Facilities Committee**

- Create long-term Facilities/Maintenance plan. **[Responsible Person/Entity: Facilities Committee].**

**YEAR 3: Board Task:**

- Establish a Real-Estate Task Force to work with the Logan Square/ Center City Philadelphia community to research the possibility of property acquisition and asset management in the area over the next 20 years. **[Revenue Source: operating budget; Responsible Person/Entity: Board].**

**FINANCES** – Financial stability of the school is critical to its growth and delivery of its mission with excellence. Currently, Greene Towne is healthy and thriving.

**YEARS 1-5: Board – Finance Committee & Administration Tasks**

- Protect 100% coverage of operating budget with hard income in perpetuity. **[Responsible Person/Entity: Board & Administration].**
  
- Reach 20% of operating budget for cash reserves ASAP and maintain over the life of the plan. **[Responsible Person/Entity: Board & Administration].**

**PERSONNEL** – The Head of School is the only employee of the board and supports a growth-focused faculty culture. The primary responsibility of the leadership team is to provide support that enables the faculty and staff to deliver the mission with excellence. The school is committed to hire, evaluate, promote and retain top Montessori teachers who support the students and their families.

**YEAR 1: Administration Tasks**

- Conduct Management Team Analysis to ensure a lean, fully functioning administration. Include succession plan for all administrative positions. **[Revenue Source: operating budget; Responsible Person/Entity: Administration].**
  
- Create cohesive professional development plan for all employees. Increase professional development budget for faculty and staff by year 5 of the plan to ensure growth-oriented faculty culture. **[Revenue Source: operating budget; Responsible Person/Entity: Board & Administration].**

**YEAR 2: Board & Administration Tasks**

- Plan for meaningful Head of School succession. **[Revenue Source: operating budget; Responsible Person/Entity: Board].**
  
- Identify and implement a comprehensive faculty evaluation system that strengthens the professional-growth focus of the faculty culture. Use the *Characteristics of Professional Excellence* as you recruit, hire, support and evaluate the teachers. **[Responsible Person/Entity: Administration].**
  
- Create cohesive professional development plan for all employees. Increase professional development budget for faculty and staff by year 5 of the plan to ensure growth-oriented faculty culture. **[Responsible Person/Entity: Board & Administration].**

**YEARS 3-5: Board & Administration Tasks**

- Create cohesive professional development plan for all employees. Increase professional development budget for faculty and staff by year 5 of the plan to ensure growth-oriented faculty culture. **[Responsible Person/Entity: Board & Administration].**