



The Montessori School
of Winston-Salem



Strategic Plan

-2013-2019-



Our Mission

Our mission is to provide a nurturing and secure environment which promotes the development of each child physically, emotionally, socially, as well as academically. We strive for a well-rounded education grounded in Montessori philosophy and teaching methods, which will develop and foster the natural curiosity of each child into a lifelong love of learning and a passion for excellence. We promote the development of a global perspective and a commitment to giving back to the community through service to others.

SWOT Analysis September, 2013

Strengths, Weaknesses, Opportunities, Threats

The Montessori School of Winston-Salem

Strengths - Internal (leverage these)

- A deep commitment from Board, leadership and faculty/staff to authentic Montessori education
- A well articulated Blueprint
- Leadership
- A parent population that is invested, enthusiastic, supportive, passionate and committed
- A Board committed to our mission and long term sustainability
- Master Site Plan and a commitment to its realization
- Facility:
 - Indoor and outdoor spaces designed in every detail to meet the needs of children
 - Beautiful natural landscape of campus
- Strong financial position; no deficits, strong cash reserves, growing Annual Fund participation
- Authentic Montessori education that values the whole child, all day
- A passionate, dedicated faculty of professionals committed to Montessori excellence and career-long professional growth

Weaknesses – Internal (address and minimize these)

- Undefined marketing strategy
- Facility:
 - close to, at, or beyond capacity for existing programs
 - No classroom space to grow programs
 - Limited space to support children with learning differences (i.e. tutoring, etc.)

- Limited indoor space for gross motor activities and large gatherings (community sings, etc.)
- Insufficient in-house support for children with learning differences
- Lack of transportation to fully support Going-outs and other off campus curricular experiences
- Insufficient structure to reach full fundraising potential
- Not yet making the best use of communication and information technology to support faculty and Elementary program

Opportunities – External (pursue these)

- Become the standard for all Montessori schools in NC
- Economy: TMS offers a better value than other private schools
- We are the only authentic Montessori program offering Elementary education in W-S
- With a lack of alternative educational options (especially at the middle school grades) in W-S, TMS could have a competitive edge in this market

Threats – External (protect against these)

- The community is not very aware of TMS or the value of a Montessori education
- Charters: expansion of them, alternative to TMS, no tuition
- Public misperception of Montessori (only for preschool age, lacking academically, isn't for every child, only for "earthy, crunchy types")

TMS Strategic Plan 2013-2019

Year One (2013-14)

Strategic Plan Items

Develop a strategic marketing plan focused on increasing waiting pools and retention of current families.

Prepare for dual accreditation application and self-study process.

Craft a Board development plan that includes a Board profile and trustee cultivation plan and acquire 4 new trustees.

Begin internal preparations for capital campaign to fund facilities expansion. Preparations to include but not limited to: refining exact needs for expansion, building the case for support & constituent buy-in, 3rd party campaign readiness and feasibility study.

Investigate the purchase of adjacent property to the north of campus and make recommendations to the Board.

Continue implementation of faculty evaluation growth & renewal system based on the staff-developed Characteristics of Professional Excellence.

Conduct a faculty/staff compensation study; develop faculty compensation structure rooted in ongoing professional development and that enhances our position as an employer of choice.

Pilot tablet use for faculty and UE program and launch Elementary Technology Curriculum Committee comprised of faculty/staff and parents.

Create a Learning Support Specialists position and vision for the integration of this role into the authentic Montessori environment.

Year Two (2014-15)

Strategic Plan Item

Implement additional elements of the Strategic Marketing Plan.

Conduct self-study for AMS/AdvancEd. dual accreditation visit in Year-3.

Finalize case for support for Campaign & develop initial building plans for new addition.

Establish Campaign management plan.

Develop budget for new faculty compensation structure to be implemented over three years beginning in Year-3.

Increase professional development budget to 2% of annual budget to support professional development compensation structure.

Begin implementation of enhanced technology plan for teachers and UE technology plan.

Assess facility needs and create a multi-year preventative maintenance plan to implement in Year-3.

Year Three (2015-16)

Strategic Plan Item

Complete Accreditation Self-Study and host accreditation team visit.

Begin *quiet phase* of capital campaign.

Complete design for new addition.

Update Mater Site Plan with new design for wet retention pond/wetland habitat.

Implement first year of new faculty compensation structure.

Increase professional development budget to 2% of annual budget (second of two installments).

Fill new Learning Support Specialist position and implement new learning support structure.

Launch Middle School Research & Design Committee comprised of representatives from Board, Leadership, faculty/staff and parents to explore the viability of continuing our student programs through 9th grade.

Year Four (2016-17)

Strategic Plan Item

Conduct *public phase* of capital campaign.

Implement second year of new faculty compensation structure.

Create new 6-year strategic plan, included findings from Middle School R&D Comm. and Accreditation Self-Study.

Year Five (2017-18)

Strategic Plan Item

Market and begin implementation of new strategic plan.

Create fresh Board profile and begin new trustee cultivation.

Reevaluate Strategic Marketing Plan and make revisions to address current needs.

Conclude capital campaign.

Begin Construction on new addition and retention pond

Implement third year of new faculty compensation structure.

Year Six (2018-19)

Continue implementation of new strategic plan.

Payoff/finance any campaign shortfalls and/or construction overrun.

Complete equipping and furnishing for new addition.

Open new addition.

Implement new strategic marketing plan.

Final Notes

- This plan, like all strategic plans, is a living breathing document that inspires and guides our work toward achieving our mission. It is the framework for ongoing strategic thinking and decision making. It will be reviewed and may be adjusted as we grow from year to year.
- The elements in this plan are primarily viability related rather than program related, i.e. addressing aspects of a school that impact it's long term viability - facilities, enrollment/retention/marketing, Board governance, faculty recruitment/development/retention, etc.
 - The Accreditation Self-Study process will bring to light perhaps more insights into programmatic needs/areas for growth, i.e. new programs, specific faculty/staff and program development needs, etc.
- Several future strategic initiatives established in this plan are contingent on findings from earlier studies, i.e. future land purchases, facilities expansion, etc.
- Not all potential capital items were calculated. The following are some items not factored in, either because they are less of a priority or are smaller investments that can be accomplished through Annual Fund giving and or with a portion of projected annual surpluses. These priorities will be determined by the Board on an annual basis. Some examples are:
 - OPLE elements; gardens, orchard, Elementary play area, remaining CH playground elements, etc.
 - Smaller renovations; expansion of library, reconfiguration of lobby space, etc.
 - Ongoing classroom capital needs; long term Montessori materials, upgrades on furniture, etc.
 - Transportation needs, i.e. activity busses, etc.