

# Amelia Island Montessori School

## Strategic Plan

October 29, 2018



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***Mission: Amelia Island Montessori School embodies a child-centered education grounded in Montessori philosophy and methodology, supporting the “whole child,” inspiring independent thinkers and cultivating collaborative citizens.***

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Amelia Island Montessori School’s development of a strategic plan reflects input from the school’s key constituents, our families and teachers, as well as the output of various analysis and workshops, including the review of previous strategic plans, Strengths/Weaknesses/Opportunities/Threats (SWOT), meetings with families, networking with other regional Montessori schools and FCIS schools, results from community surveys, and the review and discussion between the Head of School and Board of Trustees.

The previous 5 year plan from 2013 included goals which focused on student performance, parent satisfaction, quality of faculty, community outreach, parent involvement, safety, and financial health. Our most recent review was conducted in the spring of 2018. A business consultant from Florida’s SBDC was invited to lead the day long meeting. As a result of the school’s recent self-studies, this plan is likely to continue to evolve and experience revisions, taking on considerations and recommendations of the accreditation teams. Our strategic meeting was directed by industry practices for small businesses and not-for-profits. A community-wide pre-meeting questionnaire provided specific challenges and considerations as focal points for discussion. Conversation was thorough, energetic, and creative. Because the implementation of the plan is the responsibility of the Head of School and the Board of Trustees, it will re-

### ***Explanation of Terms in this Strategic Plan***

- Our mission defines our “reason for existence” and purpose as an organization.
- Goals and objectives articulate what we want to accomplish or “the what”.
- Success indicators help us understand if we have realized our goals and objectives. These indicators are meant to be directional, not punitive, and in some cases are stretch targets.

### ***Information Gathering and Plan Development Approach:***

The development of this plan reflects input from Amelia Island Montessori School’s key constituents, our families and teachers, as well as the output of various analyses and workshops. A sample of the sources that helped shape out strategic plan is:

- Review of previous Strategic Plans;
- *Strengths, Weaknesses, Opportunities and Threats (SWOT)* analysis;
- Individual meetings with families among Board Trustees and the Administration;
- Networking with other regional Montessori Schools and FCIS independent schools.
- Results from Community Surveys (Parent, Teacher, and Administration) conducted in Spring 2018; and
- Review and discussion at a special Strategic Planning Meeting of Board of Trustees in Spring 2018.

<b>Fundraising and Development</b>	<i>Committee: Development</i>		
Strategies	Game plan action	Time of action	Success Metrics
<ul style="list-style-type: none"> <li>• Build a “lead bank” of all current and former students, parents, grandparents</li> </ul>	<ul style="list-style-type: none"> <li>• Use “lead bank” for future Development Director</li> </ul>	<ul style="list-style-type: none"> <li>• Complete by end of 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Monthly status updates on creation of “lead bank”</li> </ul>
<ul style="list-style-type: none"> <li>• Increase annual fund giving, bequests, charitable trusts, grants</li> </ul>	<ul style="list-style-type: none"> <li>• Hire a part-time Development Director</li> </ul>	<ul style="list-style-type: none"> <li>• First Quarter 2020</li> </ul>	<ul style="list-style-type: none"> <li>• Donation report</li> </ul>
<ul style="list-style-type: none"> <li>• Review existing fundraisers to ensure each one is profitable and a good use of volunteers</li> </ul>	<ul style="list-style-type: none"> <li>• Track volunteer time and expensed associated with event</li> </ul>	<ul style="list-style-type: none"> <li>• After each event beginning November 2018</li> </ul>	<ul style="list-style-type: none"> <li>• Budgeted vs. actual results for each major event (e.g., Big Event, Chili Cook-off)</li> </ul>

<b>Branding/ Community Outreach</b>	<i>Committee: Marketing</i>		
Strategies	Game plan action	Time of action	Success Metrics
<ul style="list-style-type: none"> <li>• Start Instagram account supporting positive visibility</li> </ul>	<ul style="list-style-type: none"> <li>• Increase social media presence</li> </ul>	<ul style="list-style-type: none"> <li>• By spring 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Improved analytics</li> </ul>
<ul style="list-style-type: none"> <li>• Monthly HOS blog/article for parent/community education</li> </ul>	<ul style="list-style-type: none"> <li>• Increase value of school, educate parents on Montessori, HOS interacts with entire school</li> </ul>	<ul style="list-style-type: none"> <li>• Now, ongoing</li> </ul>	<ul style="list-style-type: none"> <li>• Improved event participation and improved reviews of school</li> </ul>
<ul style="list-style-type: none"> <li>• Increase videos on social media (e.g., Rants and Raves) with boosts</li> </ul>	<ul style="list-style-type: none"> <li>• Better traffic and reflection of school</li> </ul>	<ul style="list-style-type: none"> <li>• By spring 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Improved analytics</li> </ul>
<ul style="list-style-type: none"> <li>• Portraits of Graduates</li> </ul>	<ul style="list-style-type: none"> <li>• Success stories for image</li> </ul>	<ul style="list-style-type: none"> <li>• By spring 2019</li> </ul>	<ul style="list-style-type: none"> <li>• 1 or 2 interviews obtained</li> </ul>

<b>Expand Board of Trustees</b>	<i>Committee: Governance</i>		
Strategies	Game plan action	Time of action	Success Metrics
<ul style="list-style-type: none"> <li>• <b>Initiate and maintain an active recruitment campaign</b></li> </ul>	<ul style="list-style-type: none"> <li>• To increase BOT in number and diversity, as well as confirm financial commitments, skill sets, and community connections</li> </ul>	<ul style="list-style-type: none"> <li>• Early 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Number of Board members and qualifications</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Enforce Board member attendance policy</b></li> </ul>	<ul style="list-style-type: none"> <li>• Board activity, engagement and updates</li> </ul>	<ul style="list-style-type: none"> <li>• Early 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Active attendance at meetings and completed action items</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Implement quarterly Board communication to school community</b></li> </ul>	<ul style="list-style-type: none"> <li>• Raise profile and improve perception of BOT</li> </ul>	<ul style="list-style-type: none"> <li>• Early 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Published letter/articles to community</li> </ul>

<b>Growing enrollment</b>	<i>Committees: Marketing, Accreditation task force</i>		
Strategies	Game plan action	Time of action	Success Metrics
<ul style="list-style-type: none"> <li>• <b>Full enrollment</b></li> </ul>	<ul style="list-style-type: none"> <li>• Track admissions funnel</li> <li>• Be the “wow”</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>• Full enrollment (145) with waitlist</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Ongoing teacher development</b></li> </ul>	<ul style="list-style-type: none"> <li>• Research and develop growth opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing (conferences, webinars, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Hours of professional development</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Parent education programs</b></li> </ul>	<ul style="list-style-type: none"> <li>• Add concrete examples of sequencing in lessons at conferences</li> </ul>	<ul style="list-style-type: none"> <li>• 3-4 times per year</li> </ul>	<ul style="list-style-type: none"> <li>• Annual community survey</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Exit interviews conducted by BOT member</b></li> </ul>	<ul style="list-style-type: none"> <li>• Identify weak areas and views where value lacks</li> </ul>	<ul style="list-style-type: none"> <li>• Annually in spring</li> </ul>	<ul style="list-style-type: none"> <li>• Non-returning families interviewed</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Increase salaries</b></li> </ul>	<ul style="list-style-type: none"> <li>• Attract talent and higher retention</li> </ul>	<ul style="list-style-type: none"> <li>• Annually in spring</li> </ul>	<ul style="list-style-type: none"> <li>• Budget gap</li> </ul>

<b>Technology update/ tools for students</b>	<i>Committees: Finance, Development, Technology</i>		
Strategies	Game plan action	Time of action	Success Metrics
<ul style="list-style-type: none"> <li>• <b>Form Technology committee/group</b></li> </ul>	<ul style="list-style-type: none"> <li>• Maximize knowledge and relationships to improve school tech programs</li> </ul>	<ul style="list-style-type: none"> <li>• Early 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Working committee</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Identify needs/research</b></li> </ul>	<ul style="list-style-type: none"> <li>• Improve student learning and offer individualized alternative tools and practical life skills</li> </ul>	<ul style="list-style-type: none"> <li>• Spring 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Projector, smart TVs, iPads, laptops, Chrome-books</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Develop technology short/long-term strategic plan</b></li> </ul>	<ul style="list-style-type: none"> <li>• Define how tech will integrate into education programs and what will be the metrics for success.</li> </ul>	<ul style="list-style-type: none"> <li>• Early 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Technology strategic plan</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Communicate plan/results</b></li> </ul>	<ul style="list-style-type: none"> <li>• Get parent support through education of intentions</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>• Published letter/plans to school community</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Fundraise/include in tuition</b></li> </ul>	<ul style="list-style-type: none"> <li>• Define budget for needs</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing</li> </ul>	<ul style="list-style-type: none"> <li>• Funding</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Evaluate progress/update plan</b></li> </ul>	<ul style="list-style-type: none"> <li>• Invest in IT improvements, programs and tools</li> </ul>	<ul style="list-style-type: none"> <li>• Annually in spring</li> </ul>	<ul style="list-style-type: none"> <li>• Improved technology at school</li> </ul>

***Review Process and Implementation:***

The Board of Trustees synthesized and evaluated input received, determined potential revisions, if any, in order to finalize this Strategic Plan. The Strategic Plan was reviewed by the Board of Trustees in May 2018, with final approval in October 2018.

The goals, objectives and metrics within the Strategic Plan will be evaluated and incorporated into the annual planning process for AIMS. Actions to realize specific plan components will be identified, prioritized and monitored on a regular basis.