

# GMS Strategic Plan

May 26, 2009



## Vision 2020

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*By 2020, GMS will be the premier steward for sharing the Montessori philosophy in the Southeast, funded by an endowment of \$5 million.*

## Potential BOT Structure 2009/ 2010



## Planning Priorities for Vision 2020

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### **GMS PLANNING PRIORITIES 2009-2020**

GMS continuously engages in a process of planning, implementing, assessing, and improving its programs and operations while serving as a champion for the development of the Montessori philosophy in the Southeast. For 2009-2020, the school's planning process will be guided by the following priorities.

1. Efficiency and Effectiveness
2. Expanding our Community
3. Unique Qualities
4. Innovation and Recognition

## Planning Priorities for Vision 2020

### Tomorrow

- Faculty understands diversity issues in order to support diversity in student body
- Access to Land Lab, and incorporation of its use into curriculum, is present at all Division levels
- Facilities meet sustainable benchmarks
- State-of-the art Technology is provided for instruction and usage
- Strategic Plan is 'living' and monitored at BOT level

- GMS is a resource for other Montessori programs
- GMS raises a \$5 million endowment
- Land Lab is a benchmark in experiential education; open and used by community for educational, environmental and/or cultural events focused on sustainability
- Establish/ support a Montessori teacher education program for pre-service and in-service Montessori teachers

**Internal**

**Unique Qualities**

**Efficiency & Effectiveness**

**Innovation and Recognition**

**Expanding our Community**

**External**

- Human resources: recruiting the finest faculty/paying a fair wage; training; professional development; effective faculty, staff, and board assessments
- Utilize authentic Montessori method in curriculum & programs
- Increase student retention, especially in key grades
- Increase parent participation in Development
- Budget management and strategies monitored at BOT level

- Recruiting new students and families
- Marketing of GMS events to larger community
- On-going dialogue with alumni/ae and their parents and grandparents

**Today**

## Planning Priorities for Vision 2020

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### **EFFICIENCY and EFFECTIVENESS**

#### **GMS will:**

- Aggressively recruit talented faculty members who are educated (or will become educated) in the Montessori method.
- Employ a competent and courteous administration and staff to support the mission and vision of the school.
- Pay our faculty and administration a fair wage.
  - Annual performance assessments will guide pay raises.
  - GMS staff will be paid using a benchmark of 90% of North Carolina schools' pay scale.
  - Executive Committee of the Board of Trustees will provide an annual increase for salaries based on the broader average of North Carolina schools.
- Provide on-going development opportunities for faculty, administration, staff, and students.
- Annually review our faculty/ staff/ Board and develop plans for improvement for those who require them.

## Planning Priorities for Vision 2020

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### **EFFICIENCY and EFFECTIVENESS**

#### **GMS will:**

- Promote the Montessori method in the content, pedagogy, and structure of our curriculum, programs, and faculty development
- Work vigorously to improve our curriculum and programs with an emphasis on teaching innovation, leadership, global awareness, responsibility and sustainability.
- Implement strategies to improve the retention of currently enrolled students.
- Annually develop and implement appropriate strategies to encourage a high percentage of parent participation in the Annual Fund.
- Annually develop and implement appropriate strategies to manage our budget and any shortfalls.

## Planning Priorities for Vision 2020

Efficiency and Effectiveness	Person Responsible for Development & Implementation of Plan	Date to Review	Progress Notes
Aggressively recruit talented faculty members who are educated (or will become educated) in the Montessori method.	HOS (Progressive Education)		As needed. Currently, 2 teachers want to go for training Summer '09
Employ a competent and courteous administration and staff to support the mission and Vision of the school.	HOS & HR Director (Human Resources)		Currently exploring options for front desk
Pay our faculty and administration a fair wage. <ul style="list-style-type: none"> <li>•Annual performance assessments will guide pay raises.</li> <li>•GMS staff will be paid using a benchmark of 90% of North Carolina schools' pay scale.</li> <li>•Executive Committee of the Board of Trustees will provide an annual increase for salaries based on the broader average of North Carolina schools.</li> </ul>	HOS & HR Director (Human Resources)		Not currently using the annual performance assessments for salary guides but will institute Fall '10. Difficult subject. Need to determine how BOT will provide flex in budget to support salary increases.
Provide on-going development opportunities for faculty, administration, staff, students and BOT.	HOS & AHOS (Progressive Education)		In-house via workshops, conferences and Faculty Mtgs
Annually review our faculty/ staff/ Board and develop plans for improvement for those who require them.	HOS & HR Director (Human Resources)		'08/'09 revised faculty/ staff assessment to an annual process

## Planning Priorities for Vision 2020

<b>Efficiency and Effectiveness</b>	<b>Person Responsible for Development &amp; Implementation of Plan</b>	<b>Date to Review</b>	<b>Progress Notes</b>
Promote the Montessori method in the content, pedagogy, and structure of our curriculum and programs.	HOS & AHOS (Progressive Education)		Done daily. Aid faculty in staying current on Montessori research
Work vigorously to improve our curriculum and programs with an emphasis on teaching innovation, leadership, global awareness, responsibility and sustainability.	HOS & AHOS (Progressive Education)		All faculty given copies of Montessori Life. Faculty has worked the past 2 years on aligning our curriculum with N.C. state standards.
Implement strategies to improve the retention of currently enrolled students.	Director of Marketing		See Marketing Plan
Annually develop and implement appropriate strategies to encourage a high percentage of parent participation in the Annual Fund.	Director of Development		See Development Plan
Annually develop and implement appropriate strategies to manage our budget and any shortfalls.	Director of Finance		

## Planning Priorities for Vision 2020

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### **EXPANDING OUR COMMUNITY**

#### **GMS will:**

- Use all Marketing tactics available in order to increase our awareness with our target market, educate our target as to the GMS unique qualities and create motivating messages to promote visits and, ultimately, enrollment.
- Communicate, raise awareness for and promote participation in GMS events which encourage community involvement.
- Maintain an on-going dialogue with the broader GMS community (alumni/ae, parents and grandparents of alumni/ae, key media contacts, etc.) so as to create a responsive community base.

## Planning Priorities for Vision 2020

<b>Expanding our Community</b>	<b>Person Responsible for Development &amp; Implementation of Plan</b>	<b>Date to Review</b>	<b>Progress Notes</b>
Use all Marketing tactics available in order to increase our awareness with our target market, educate our target as to the GMS unique qualities and create motivating messages to promote visits and, ultimately, enrollment.	Director of Marketing		See Marketing Plan
Communicate, raise awareness for, and promote participation in GMS events which encourage community involvement.	Directors of Marketing and Development		See Marketing Plan and Development Plans
Maintain an on-going dialogue with the broader GMS community (alumni/ae, parents and grandparents of alumni/ae, key media contacts, other Montessorians, etc.) so as to create a responsive community base.	Director of Marketing		See Marketing Plan

## Planning Priorities for Vision 2020

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### **Unique Qualities**

#### **GMS will:**

- Aggressively recruit a diverse student body receptive to the Montessori philosophy and methods.
- Utilize our Land Lab to foster environmental stewardship and elaborate on Maria Montessori's vision of experiential learning
- Enrich campus life by increasing access to the GMS Land Laboratory and extracurricular opportunities for students.
- As required, upgrade its physical facilities to meet sustainable benchmarks and provide a safe, efficient campus and learning environment.
- Provide state-of-the-art technology and equipment for instruction and administrative operations.
- Improve our strategic planning/assessment processes so as to incorporate a 'living' operational plan – managed and reviewed at the Board of Trustee level – which achieves Vision 2020.

## Planning Priorities for Vision 2020

Unique Qualities	Person Responsible for Development & Implementation of Plan	Date to Review	Progress Notes
Provide means by which GMS can define what diversity means to our community and continue to support the recruitment of a more “diverse” community.	Director of Admissions (short-term) in conjunction with Director of Marketing (long-term)		See Diversity Plan
Utilize our Land Lab to foster environmental stewardship and elaborate on Maria Montessori’s vision of experiential learning	Director of Land Lab		See Land Lab Plan
Enrich campus life by increasing access to the GMS Land Laboratory and extracurricular opportunities for students.	Director of Land Lab		See Land Lab Plan
As required, upgrade its physical facilities to meet sustainable benchmarks and provide a safe, efficient campus and learning environment.	Director of Maintenance and Sustainable Facilities		See Facilities Plan
Provide state-of-the-art technology and equipment for instruction and administrative operations.	Consultants (Technology)		See Technology Plan
Improve our strategic planning/assessment processes so as to incorporate a ‘living’ operational plan – managed and reviewed at the Board of Trustee level – which achieves Vision 2020.	Board Chair (Ops)		

## Planning Priorities for Vision 2020

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### **INNOVATION and RECOGNITION**

#### **GMS will:**

- Serve as resource for other Montessori programs in the Southeast.
- Raise a \$5 million endowment by 2020.
- Cooperate with other organizations to increase the number of cultural, arts, and informational events for students, teachers, parents and community members.
- Share the knowledge gained from our Land Laboratory experiences as a critical and necessary element in elementary and middle school education.
- Increase access to the GMS Land Laboratory by introducing 'open' programs for the larger community.

## Planning Priorities for Vision 2020

<b>Innovation and Recognition</b>	<b>Person Responsible for Development &amp; Implementation of Plan</b>	<b>Date to Review</b>	<b>Progress Notes</b>
Serve as resource for other Montessori programs in the Southeast.	AHOS and a faculty committee on Community Partnerships		Frank does accreditation visits to other schools across the country. We help GSC magnet programs and offer our school for visits from other teachers and students
Establish / support a Montessori teacher education program for pre-service and in-service Montessori teachers	HOS and a faculty committee on Community Partnerships		Please see Progressive Education Plan
Raise a \$5 million endowment by 2020.	Director of Development		Please see Development Plan

## Planning Priorities for Vision 2020

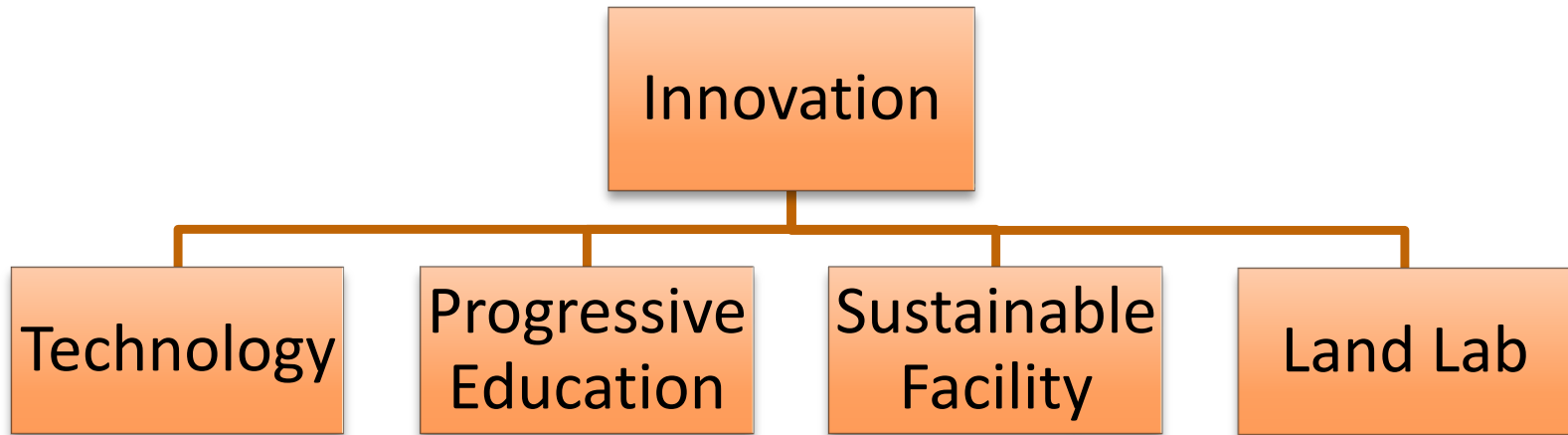
<b>Innovation and Recognition</b>	<b>Person Responsible for Development &amp; Implementation of Plan</b>	<b>Date to Review</b>	<b>Progress Notes</b>
Cooperate with other organizations to increase the number of cultural, arts, and informational events for students, teachers, parents and community members.	AHOS (Community Partnerships) and Marketing Committee		Easter Music Festival; children's theatrical group; Richard Louv, NCAIS BOT, International Fair; local area for field trips
Share the knowledge gained from our Land Laboratory experiences as a critical and necessary element in elementary and middle school education.	Director of Land Lab		See Land Lab Plan
Increase access to the GMS Land Laboratory by introducing 'open' programs for the larger community.	Director of Land Lab		See Land Lab Plan

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# **Plans for Individual Committees**

## Potential BOT Structure 2009/ 2010

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**Technology Plan: to be filled in by Dynamic Quest by December 2009**

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**2009 – 2011:**

## Progressive Education Plan: Long term goals

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### Strategic Initiative:

- Establish / support a Montessori teacher education program for pre-service and in-service Montessori teachers

### Tactics:

- Develop, with the full faculty, an ongoing professional development plan for the continuing education of the faculty, staff, and Board of Trustees. Workshops and other professional development activities will be based on current needs and in response to data obtained from assessments and evaluations. Activities will include assisting faculty to engage in Montessori teacher education programs for those who do not yet have Montessori credentials.

## Progressive Education Plan: Long term goals

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### Tactics:

- Provide formal and informal sessions for Montessori educators in the Triad and throughout North Carolina to share resources and best practices.
- Identify and support master teachers and others within the GMS community who can facilitate learning about The Montessori Method for beginning teachers, parents, board members, and others.
- Conduct a market analysis to determine the feasibility of running a Montessori teacher education program at The Greensboro Montessori School.
- Contact local colleges and universities to examine the likelihood of providing N.C. teacher licensure and/or master's degree status in conjunction with Montessori teacher education.
- Design a pre-service teacher education program with complies with MACTE standards.

## Facilities Plan: Long-term Goals

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### **Primary Topics**

#### Water

##### Harvesting

- Gymnasium roof

- Use for irrigation

- Prevent run off/erosion

##### Efficiency

- Replace current faucets with low-flow faucets

#### Urinals

- Go waterless in the middle school and gymnasium

#### Solar

##### Day-lighting

- Evaluate current system

##### Power source

- Place panels on the gymnasium roof and middle school roof

- Goal of “going off the grid”

## Facilities Plan: Long-term Goals

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### **Primary Topics**

#### Wind

- Micro-wind turbine

  - Not feasible for our area, but could be an interesting learning tool.

#### Electricity

- Evaluate current system

- Upgrade to energy-saving appliances

- Replace all bulbs with energy efficient bulbs

- Replace all exit signs w/ non-electrical units

#### Soil Erosion

- Rain Garden

- Re-grade parking area

## Facilities Plan: Long-term Goals

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### **Primary Topics**

#### Recycle Program

- More obvious

- Recycled office supplies

#### Alternative Transportation

- Bio-Diesel Bus for field trips

- Common Bus-stop (Friendly Shopping Center?)

#### Learning Lab

- Dashboard Software could be used to educate the students about the various sustainable practices we employ

## Land Lab Plan: Long-term Goals

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### 2012 – 2020:

- Ensure that GMS has continued access to the Land
- Add toilet facilities
- Acquire a vehicle to be used for transporting supplies to Land Lab
- Publish articles that share our program and experience with the greater community
- Reach out to greater community by inviting students and teachers outside the school to participate in Land Lab programs
- Build a GMS Land Lab website to enrich communication with internal community and educate larger, global community about the Land Lab program at GMS

## Land Lab Plan: Short-term Goals

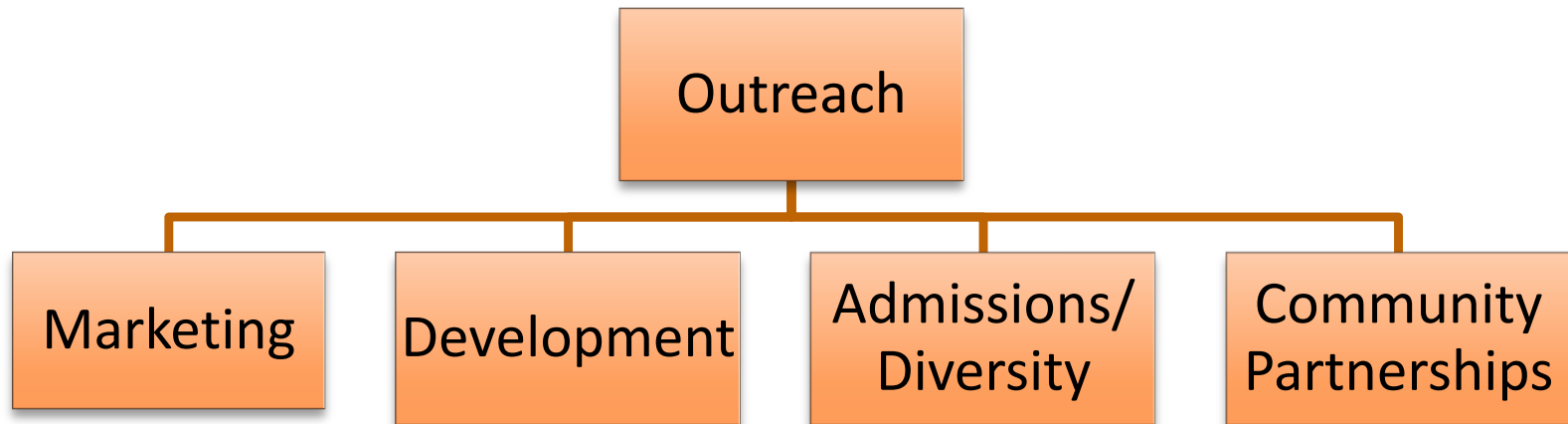
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### 2009 – 2011:

- Develop Land Lab curriculum by Division--Primary-Upper El will add several trips to their 09/10 curriculum and integrate these into their classroom curriculum
- Encourage teachers to hold camps at the Land for summer 2010 (2009 nature-based camps move to the Land Lab, archaeology camp and new camps)
- Add compensation for teachers' vehicle use and time to Middle School Land budget
- Inventory supplies and equipment purchased with past Land Lab budgets, catalog, and determine lifespan
- Determine best semi-permanent structures to add to Land Lab and provide guidance to students in building them
- Hold "Curriculum Night" in the fall just as divisions do
- Secure a blanket permission form that makes the Land Lab more a part of the campus and less like a field trip
- Foster community by holding nature-based GMS Events at the Land Lab
- Tie students to the larger community by participating in programs like the Haw River Watch

## Potential BOT Structure 2009/ 2010

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## Marketing Plan: Long-term Goals

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### 2015

#### Long-term Strategic Initiative

- Aggressively recruit a diverse student body receptive to the Montessori philosophy and methods.

#### Tactics

- Establish a task force to define target audiences, ascertain “hot buttons” and objections through one-one interviews and previous knowledge, identify venues/vehicles for reaching target with message

## Marketing Plan: Short-term Goals (2012)

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### Strategic Initiative:

- Implement strategies to improve the retention of currently enrolled students.

### Tactics:

- Extra home visits throughout the year (admin and teacher) to families for education and community building.
- Host quarterly Community Meetings that include dinner, childcare, brief topical speaker, Q&A with faculty, and business/volunteer mtg, email summary of event to parents
- Improve content of weekly e-news updates to include more links to specific classroom news and events posted on website
- Develop “Montessori Moments” emails to educate community about philosophy, Montessori Journey and approach to learning; create another touchpoint.
- Encourage more email/written/phone teacher-parent communication.
- Formalize and communicate current parent discussion groups at a parent business location
- Create a GMS group on Facebook
- Develop online GMS Community Business Directory that is also included in handbook and feature rotating business links on newsletter
- Increase coordination efforts of parent volunteers

## Marketing Plan: Short-term Goals (2012)

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### Strategic Initiative:

- Use all Marketing tactics available in order to increase our awareness with our target market, educate our target as to the GMS points of uniqueness and create motivating messages to incent visits and, ultimately, enrollment.

### Tactics:

- Develop a media relations plan to generate placements in local and online media.
- Develop a series of consistent ads to run in local pubs and radio that clearly articulates our unique positioning statement and promotes key events
- Establish a social media presence (Facebook, LinkedIn, groups, local forums)
- Establish key community partnerships and develop clear agreements.
- Revise our basic rack card and distribute liberally
- Design an event template postcard for mailing
- Improve format, ease of use and functionality of current Website
- Continuously evaluate our SEM efforts to be sure we're optimized and listed in appropriate places
- Institute a better leads tracking system

## Marketing Plan: Short-term Goals (2012)

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### Strategic Initiative

- Communicate, raise awareness for and incent participation in GMS events which encourage community involvement.

### Tactics:

- Invite prospects and GMS community to quarterly Community Meetings that include dinner, childcare, brief topical speaker, Q&A with faculty, and business/volunteer time.
- Invite prospects and GMS community to our ongoing events and celebrations via email
- Create sponsor and recognition opportunities for parent business owners at GMS events throughout the year.

## Marketing Plan: Short-term Goals (2012)

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### Strategic Initiative:

- Maintain an on-going dialogue with the broader GMS community (alumni/ae, parents and grandparents of alumni/ae, key media contacts, etc.) so as to create a responsive community base.

### Tactic

- Expand our email/mail distribution list to include key stakeholders
- Improve content of weekly e-news updates to include more links to specific classroom news and events posted on website
- Develop “Montessori Moments” emails to educate community about philosophy and approach to learning and create another touchpoint.
- Invite to our quarterly Community Meetings
- Develop special sponsorship/giving opportunities for them
- Invite them to host a social event
- Include them in the GMS Community Business Directory
- Offer GMS as a local education resource to key media contacts

## Development Plan: Long-term Goals

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### Capital Campaign Components & Ideas:

- Hire a campaign consultant
- Build campaign around a theme
- Goal will be to establish a base of donors and a base of prospects which we will grow each year
- Approach parents to help GMS to partner with local companies and organizations who share our mission and core values.
- Corporate sponsors around a theme---partners in nature, natural partners for learning, Green Learning, It's Easy Being Green, Green with Learning
- Have a board champion for each piece of campaign
- Board equity plan: "It takes a community to build a school"
- Establish a Needs List. (This is essentially a shopping list for individuals, foundations and corporations to underwrite specific program costs if they desire. Different items related to the vision.)

## Development Plan: Long-term Goals

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### Capital Campaign Components & Ideas:

- Focus on big ideas and outcomes—not just the process of raising money for a school. Communicate the “big picture” benefits to potential donors. Our big picture could be about our environmental based learning lab.
- Naming rights (unsure if this is possible if we do not own the Land)
- Empower and involve our faculty and staff through organizational/info meetings and recognition initiatives
- Develop a more effective communications plan to relate the campaign mission, objectives, plans and most importantly “user-level” benefits

## Development Plan: Long-term Goals

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### Ideas for Other sources of funding:

- Grants from experiential learning/nature based foundations or initiatives
- Sell naming rights to a spiral path (like a brick campaign) or a tree campaign; sponsor a tree on the land
- Gift tree. A three dimensional sculpture of a tree with burnished metal leaves is fixed upon a wooden backdrop for wall mounting. Each leaf is engraved with the donor's message. The end result is high-quality artwork in the foyer or lobby that recognizes the donor's gift

## Development Plan: Short-term Goals

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- Focus on Annual giving campaign.
  - Have a consistent focus on this throughout the entire year, beginning with August kick-off.*
  - Raise money and raise participation.*
- Social Events.
  - Have a series of social events in November and April, with a Sweethearts Dance in February for children and families.*
- Small annual celebration in gym or at the land.
  - In keeping with the calendar of events, this should happen in April 2010.*
- Classroom/Division Fundraisers (Optional based on GMS teachers & faculty.)
- Identify and apply for grants
  - Partner with a consultant - ongoing throughout the year.*
- Lay ground work for capital campaign.

## Development Plan: Short-term Goals

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### Options for 2009/2010

#### Option A

Annual Giving Campaign only, with a goal to raise \$100-125K. With a 5% decline in enrollment next year, it is estimated that Development will have a budget of \$12,000 for the 2009-2010 year.

#### Option B

Annual Giving Campaign plus fundraising projects much like this year. Raise \$150-200k, and will need \$50K for marketing/development efforts

#### Option C

Full-blown Capital Campaign to include all of the above plus extended campaign efforts using a consultant. Raise \$275K net, need \$75K for marketing/development efforts (first of perhaps 3 installments)

## **Diversity Plan: Long-term Goals**

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**2012-2013** – Our faculty will formally revisit the curriculum with regards to global learning and make changes accordingly.

**2013–2015** - The Board of Trustees and the Marketing Committee will investigate how to get the word out to the larger Guilford County community that the mission of our school focuses on global learning with regard to creating “responsible, global citizens.”

**2020** – Our school will have a goal of attracting a diverse population that reflects the diverse population of the Guilford County community with regard to our school’s definition of diversity at that time.

## **Diversity Plan: Short-term Goals**

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**2009-2011** - These two years will be spent assessing where our School's diversity knowledge stands by surveying parents, asking the faculty and Board of Trustees to respond to an Intercultural Development Inventory, and to hold focus groups with the faculty and Board. Knowledgeable faculty from UNC-G will facilitate the presentation/focus groups. As our understanding grows, the faculty will continue to revisit the curriculum to adjust it accordingly. The staff and faculty professional development will focus on assessment and development with regard to diversity for the next 2 years.

**2010-2011** - Beginning in the 2010-2011 school year, hold a "Global Day" each year. Invite a guest speaker who is knowledgeable in some aspect of global awareness. Promote it to the greater surrounding community.

## **Community Partnerships Plan**

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Committee to be formed to address this in 2009/2010 school year.