



Strategic Plan

2016-2019

Drafted Fall 2016

Stabilize. Develop. Sustain. Thrive.

- Page 2** **MISSION and PROGRAMMING**
Enhance and preserve the strength of our programs, focusing on the ways we inspire students to create, explore, discover, ____.
- Pages 3-4** **COMMUNITY OUTREACH**
Develop and strengthen practices that enhance our visibility and image within our school community and beyond, and foster community partnerships.
- Page 5** **PHYSICAL RESOURCES & PHYSICAL PLANT**
Identify the development needs of faculty and the physical needs of the school's facilities/classrooms.
- Page 6** **FINANCE**
Strengthen MSCS's financial sustainability and further develop the financial infrastructure.
- Pages 7-8** **GOVERNANCE**
Establish policies and procedures that increase consistency and define expectations of individuals within the staff and board.
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MISSION and PROGRAMMING

Objective:

To preserve and enhance the strength of our programs.

Board member overseeing: Harvest Leasure

Faculty member overseeing: Michael Brown

1. Reinforce the culture of the school and follow up on decisions made on structure and age ranges.

- Keep in mind the five words that align with the school's mission (.
- Evaluate value of teacher interaction with students in every decision we make.
- Clarify our emphasis on outdoor education.
- Recall Board work from fall 2015: Montessori philosophy and infant and toddler program research.

2. Understand existing approaches to teaching and learning to develop areas of growth and refinement.

- Revisit our current pedagogies to better articulate a unified practice that reflects our mission and core educational beliefs.

3. Ensure that our programs are consistently aligned with our vision and mission.

- MSCS will investigate accreditation with AMS , SACS, and/or AEE (Start process in 2018)
- A minimum of one visit from an outside program specialist each semester to sit in on classes and programs and provide MSCS a written evaluation

4. Ensure faculty has the tools it needs to build and develop strong programs.

- Clarify our position on testing and tracking student progress (2017).
- Faculty trainings and lead teacher certifications in Montessori and other methodologies (2018)
- Develop a risk management plan for on campus and off campus trips (Spring 2017)
- Curriculum development to insure there is consistently and flow from one class to another (ongoing - opening day 2017)
- Develop a feasibility plan and develop curriculum for both a toddler and middle school programs (middle school – Fall 2016; toddler - 2018)

5. Develop an internal evaluation tool that promotes growth, collaboration and support among faculty and staff.

- The Executive Director and staff will collaborate to create an internal evaluation tool to be used in spring 2017.

COMMUNITY OUTREACH

Objective:

To develop and strengthen practices that enhance our visibility and image in our school community and beyond.

Board member overseeing: Wendy Manner

Faculty member overseeing: Michael Brown

1. Continue to strengthen our current community of teachers, students and families by providing opportunities to connect, support, and grow our school.

- Retain current families (ongoing)
 - This is just what we do. Improving everything across the board accomplishes that.
- Ensure that enrolled families have a clear understanding of mission and practices.
 - Refine and make additions to parent handbook (Winter 2016 - Michael Brown)
 - Community meetings (two per school year - ongoing)
- Develop sense of responsibility to school community in enrolled families (ongoing)
 - Focus on outreach (park bench conversations, positive gossip, etc)
 - Volunteering to support school
 - Quarterly “event days” (starting January 2017)
 - teachers have opportunity for professional development/in-service
 - parents staff and program activities/lessons for students *parents in the classroom*
 - Parents’ night out (Fall 2016)
 - Class buddies for new families (August 2016 - Wendy Manner)
 - After-school intensives (Spring 2017)
 - Develop greater parent education opportunities.

2. Share the Mountain Sun mission and vision with the broader Brevard/WNC community.

- Continue with work with VISION, the Chamber of Commerce, articles in the paper.
- Find county research including market analysis, future expansion, demographics (September 2016)
- Consider marketing opportunities that might exist in the summertime.
- Encourage board and faculty involvement in larger community events (beginning August 2016)
- Create community outreach coordinator position (as budget allows - 2018)
 - donor follow up

- press releases
- advertising
- alumni relations
- database management
- Widen current marketing range by advertising beyond Brevard (January 2017)

3. Improve admissions process

- Clarification of fee structure (ongoing - Financial Strategic Plan)
- Clear process
- Orientation for new families

PHYSICAL RESOURCES AND PHYSICAL PLANT

Objective:

Identify the development needs of faculty and the physical needs of the school's facilities/classrooms; identify and obtain resources to ensure faculty and facilities offer consistency through out the program and are aligned with our mission and vision.

Board member overseeing: Joyanne Baron

Faculty member overseeing: Michael Brown

1. All classrooms and programs will have appropriate teaching materials and supplies in order to provide an exceptional hands-on experience and enhance the vision and mission of the school.

- Identify additional teaching materials needed for all current classrooms and programing as we move into the BMC space (Fall 2016).
- Annually draft budget for necessary materials (ongoing).
- Obtain at least 50% of larger/costly items (Spring 2019).

4. The outdoor space we utilize at BMC will enhance the school's programing and provide additional opportunity for experiential education.

- Identify outdoor improvements needed at the Stables building and draft budget (Spring 2017)
- Complete at least 75% of outdoor improvements (Spring 2019)
- Identify trails and garden spaces (Spring 2017)
- Identify outdoor gear necessary to enhance programs and draft budget (Spring 2017)
- Have in place access to at least 50% of outdoor gear needed either through ownership or collaborative community efforts (2019).

5. The buildings we currently occupy will enhance the learning environment of the students.

- Identify all upgrades needed indoors of the buildings we currently occupy and draft budget (Winter 2016)
- Complete at least 50% of all upgrades needed (Spring 2018) and all by Spring 2019.

6. Work with Brevard Music Center to identify other buildings we may use if our growth necessitates new facilities.

- Investigate other spaces at the BMC that may better fit our needs or may be needed as an additional classroom (Fall 2016) and draft budget for improvements.

FINANCE

Objective: Strengthen MSCS's financial sustainability and further develop the financial infrastructure.

Board member overseeing: Claudia Hawkins

Faculty member overseeing: Michael Brown

1. **Develop and approve budget for each fiscal year that results in a net surplus, and provides adequate cash flow for operations.** (ongoing)
- 2.
3. **Determine desired compensation levels for faculty and staff and develop plan to achieve these compensation levels.**
 - Document MSCS existing positions, including a job description for each. (March 2017)
 - Gather information for comparable compensation for each position from Montessori sources, public school and independent school sources. (Spring 2017 – January)
 - Determine what elements should be considered in compensation beyond minimum required skills/experience, e.g. education level, certification, years of experience. (Spring 2017 – January)
 - Document compensation ranges for each position using information/decisions from previous steps. (Spring 2017 – January)
 - For each existing position compare current compensation with ranges from step d. and document any gap that exists. Determine reasonable time frame to close any gap in compensation level. (Spring 2017 – January)
 - In conjunction with analysis of tuition discounts/financial aid, determine appropriate tuition remission policy for staff and faculty. (February 2017)
3. **Develop plan to pay off outstanding debt, both promissory notes and short term debt not evidenced by promissory notes.** (Spring 2017 – March 15)
 - Prepare a schedule of payments by year for use in the five year financial plan.
 - Review all documentation for promissory notes to ensure that current schedule accurately reflects due dates and amounts. (Fall 2016 – Nov. 30)
 - Outline specific fundraising goals annually.
4. **Develop five year financial plan that includes Items 2 and 3, as well as:**
 - Tuition discount goals
 - Financial Aid (Fiscal Year 2019)
 - Family Discounts (Already complete)
 - Remission (Spring 2017 – March)
 - Optimum tuition rates/scale (Summer 2017 – August)
 - Optimum student population (Summer 2017 – August)
5. **Develop and document tuition payment policy, including payment plans dealing with past due payments.**
6. **Develop and document financial processes and procedures to assure adequate internal controls and continuity in the event of personnel changes.** (August 2019)

GOVERNANCE

Objective: The goal of the governance section is to establish policies and procedures that increase consistency and define expectations of individuals within the staff and board.

Board member overseeing: Jennifer Stewart

Faculty member overseeing: Michael Brown

1. Create a faculty/staff operational policies manual and provide a copy to all faculty/staff by August 2017.

- Create a Staff Manual - Define policies regarding staff evaluations, faculty/staff compensation, raises, personal/sick leave time, and formalized job descriptions. (Fall 2017)
- Define policies for hiring or terminating staff.
- Create system for providing staff training opportunities, including training of substitute and temporary employees, and define requirements for training for each employee role.
- Define system for allocating budgeted funds to individual classes for materials and field experiences.
- Create manual for safety procedures and response procedures for emergency situations.
- Step by step policy for dealing with behavioral issues and/or gaining extra behavioral or academic help for students.
- Define and consistently apply policies on student attendance, tardiness, and participation in field experiences.
- Create a clear and thorough format for student evaluation and parent/teacher conferences. (in progress)
- Define and apply a policy for the retention and destruction of documentation.

2. Update the board manual and by-laws and assure that all board members have a current copy. (Fall 2019)

- Update manual sections on board terms, board recruitment, board member training, and job descriptions/roles for board and executive committee members by January 2017.
- Create and implement a consistent system and schedule for board member evaluations and executive director evaluations by January 2017.
- Create written Conflict of Interest and Whistleblower/ Anti-retaliation Policies. Define a policy on reporting business or family relationships between any two individuals who are board members or employees of the organization by August 2017.
- Define policies on adding or removing board members by January 2018.
- Define the ideal make-up of the board regarding needed roles, diversity, and number of members by January 2018.

3. Create and uphold policies regarding board and organizational transparency. (Fall 2019)

- Define who is welcome to attend board meetings (i.e. community members, parents, staff, etc.) by January 2017.
 - Make available to all board members a copy of the 990 before filing on an annual basis from June 2016 onward.
 - Define how the organization will make available to the public its documents including the following by January 2019: Mandated--“Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only).” Optional—“governing documents, conflict of interest policy, and □ financial statements” and “documentation of meetings.”
- 4. Create and update policies regarding the leadership of the school. (Fall 2018)**
- Define policy for determining compensation for the Executive Director as defined by the 990 form based on “a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision.”
 - Define policy for hiring or terminating Executive Director and guidelines by which the Executive Director should give notice of resignation.
 - Develop policies defining the financial authority of the executive director and his/her responsibilities towards the board.
 - Revisit and update the job description of the Executive Director.
 - Lay out a document describing the ideal administrative structure and definition of roles within that structure for the future of the school.

TASK TIMELINE

2015-16 – STABILIZE.

- Positive cash flow.
- Clarify our mission and vision, structure (Montessori), and age ranges.
- 50% of upgrades to physical plant completed.
- Class parents established.
- List of necessary outdoor improvements to Stables.
- Identify all indoor building upgrades.

2016-17 – DEVELOP.

FALL 2016

- Plan after-school intensives for 2017.
- Develop ED and faculty internal evaluation tool.
- Parents' Night Out
- Policies for hiring and terminating
- Class buddies
- Demographic research
- Document all faculty positions.
- Determine faculty compensation levels.
- Middle school research, recruiting, fundraising.
- Refine Parent Handbook.
- Tuition payment policy.

SPRING 2017

- Each January, generate list of classroom resources needed.
- Quarterly event days.
- Parents in the classrooms.
- Tuition remission policies (by Feb. 1)
- Clarify admissions fee structure.
- Draft budget for building upgrades.
- Identify trail access and development.
- After-school intensives begin.
- Widen current market range.
- Identify garden space.
- Explore feasibility of community outreach coordinator position.
- Research lead teacher Montessori certification.
- Risk Management Plan.
- Emergency and safety manugla.
- Budget for additional BMC space.
- Identify necessary outdoor gear.
- Develop plan for debt pay off (March 15)

- Board manual update (including Board evaluations, Board Conflict of Interest, Board policy on who attends meetings, ideal Board make-up, public access to documents)

SUMMER 2017

- Five Year Financial Plan
- Faculty Manual/Handbook (staff training systems, policy re: behavioral issues, policy for retention and destruction of documentation).
- ED job description.
- Financial authority of ED.
- Policy for hiring and terminating ED.
- Policy for determining ED compensation.
- Revisit ideal administrative structure.

2017-18 – SUSTAIN.

FALL 2017

- Formalize curriculum development.
- Toddler program research

SPRING 2018

- Keep establishing a budget with a net surplus.
- Ten-year party!
- Investigate and decide about accreditation (SACS, AMS, AEE)
- 100% of facility upgrades completed.

SUMMER 2018

- Transylvania Experiential Education Consortium?

2018-19 – THRIVE.

SPRING 2019

- Research high school program
- Montessori teacher training completed
- Alumni committee?

SUMMER 2019

- Financial processes and procedures
- Diversity assessment
- New Strategic Plan
- Lease renewal/ Permanent home?

QUESTIONS FOR US TO REVISIT

- Where are art and music in the next four years?
- Should Spanish or other language acquisition appear in our academic skills?