

1-Page Strategic Plan

October, November, December

Date: September 2019

Core Values Should/Shouldn't: Forever	Purpose (Why) 10-30 Years	Targets (Where) 3-5 years	Goals (What) 1 year	Actions (How) Quarter																																										
<p>Compassion Open and committed to understanding and supporting one another</p> <p>Curiosity Inquisitive beyond established frameworks</p> <p>Creativity Originality and fostering of ideas</p> <p>Inclusive Share and receive towards understanding</p> <p>Integrity Open, honest, and accountable</p> <p>Living the Values & Purpose <i>Discussed every quarter - do we walk the talk?</i></p>	<p>Love of Learning. Freedom to Fly.</p> <p>BHAG <i>Big Hairy Audacious Goal</i></p> <p>100% of Montessori trained lead teacher. Value academic growth and equally value the holistic development of the child (cognitive, emotional, and physical well being). Sharing knowledge and resources with broader community.</p> <p>Brand Promise</p> <ul style="list-style-type: none"> Develop curiosity, creativity and character Foster independence and social responsibility within a community framework Inspire the love of learning independently and collaboratively Highlight global justice, fairness and peace <p>KPIs <i>Kept Promise Indicators</i></p> <p>Behavior Rubric & Trends Staff Retention Re-Enrollment Rate World-beyond-our-door Student Exposure Capstone and transition</p>	<table border="1"> <tr> <td>Future Date</td> <td>July 1, 2021</td> </tr> <tr> <td>Fund Balance</td> <td>25%</td> </tr> </table> <p>Sandbox</p> <p>Public Montessori education for Y5-8 grade students living in northern Ottawa and southern Muskegon counties.</p> <p>Critical #: Enrollment #s</p> <table border="1"> <tr> <td>G</td> <td>>250</td> </tr> <tr> <td>Y</td> <td>between 235 and 249</td> </tr> <tr> <td>R</td> <td>234<</td> </tr> </table> <p>Critical #: Fall to spring 3% academic growth</p> <table border="1"> <tr> <td>G</td> <td>3>%</td> </tr> <tr> <td>Y</td> <td>between 2-2.9%and goal</td> </tr> <tr> <td>R</td> <td>1.9%<</td> </tr> </table> <p>Key Thrusts/Capabilities <i>3-5 Year Priorities</i></p> <ol style="list-style-type: none"> Establish and achieve educational standards above and beyond the regulatory requirements through Montessori application and practices. Top Montessori Certified Teachers seek us out because of: 1) The community/culture we have created through our values and sustainable practices in development & compensation. Financial health sustainability models for enrollment under 234, breakeven @ 234, and max# of 300. (facility, staff, annual enrollment) Create physical environment that mirrors the core values (garden, meadows, modular, shared spaces, etc.) Explore the addition of grade levels (including child development and high school and classes) 	Future Date	July 1, 2021	Fund Balance	25%	G	>250	Y	between 235 and 249	R	234<	G	3>%	Y	between 2-2.9%and goal	R	1.9%<	<table border="1"> <tr> <td>Year Ending</td> <td>6/30/20</td> </tr> <tr> <td></td> <td>#'s in 000's</td> </tr> <tr> <td>Revenues</td> <td>\$2,521</td> </tr> <tr> <td>Expenses</td> <td>\$2,547</td> </tr> <tr> <td>Net Income</td> <td>(\$26)</td> </tr> <tr> <td>Fund Balance, \$</td> <td>\$869</td> </tr> <tr> <td>Fund Balance, %</td> <td>25%</td> </tr> </table> <p>Critical #: Min of 25% fund balance</p> <table border="1"> <tr> <td>G</td> <td>25%></td> </tr> <tr> <td>Y</td> <td>[between]</td> </tr> <tr> <td>R</td> <td>19%<</td> </tr> </table> <p>Critical #:</p> <table border="1"> <tr> <td>G</td> <td></td> </tr> <tr> <td>Y</td> <td>[between]</td> </tr> <tr> <td>R</td> <td></td> </tr> </table> <p>Key Initiatives <i>Annual Priorities</i></p> <ol style="list-style-type: none"> 	Year Ending	6/30/20		#'s in 000's	Revenues	\$2,521	Expenses	\$2,547	Net Income	(\$26)	Fund Balance, \$	\$869	Fund Balance, %	25%	G	25%>	Y	[between]	R	19%<	G		Y	[between]	R		<p>Rocks Quarterly Priorities & Accountability: Oct-Dec 2019</p> <ol style="list-style-type: none"> Physical Space: Feasibility Presentation by Kennari - October 21, 2019 - Done • Work to be done 12/23/19 • Pre-Feasibility Presentation by Kennari - October 21, 2019 - Done Board Succession to be scheduled for 12.16.19 • See Mark's goals below. • Interviews Mark to: EOP - Bd to review for Feb. assessment • Submit EOP - Bd to review for Feb. assessment • Ensure math focus in communication • Include board succession in communication <p>Quarterly Theme Building Sustainability</p>
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