

1-Page Strategic Plan

July, August, September

Date: July 13, 2021

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>To become an exemplar Preschool thru 8th grade Montessori Institution. To support Walden Green graduates through their High School years.</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, 2022</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) 30 at each grade level (K5-8). Any additional #s would be added grades. Create physical environment that mirrors the core values (garden, meadows, modular, shared spaces, etc.). Explore the addition of Preschool and expansion of Young 5s enrollment. 	Future Date	July 1, 2022	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>6/30/22</td> </tr> <tr> <td></td> <td>#'s in 000's</td> </tr> <tr> <td>Revenues</td> <td>\$2,832</td> </tr> <tr> <td>Expenses</td> <td>\$2,857</td> </tr> <tr> <td>Net Income</td> <td>(\$25)</td> </tr> <tr> <td>Fund Balance, \$</td> <td>\$1,343</td> </tr> <tr> <td>Fund Balance, %</td> <td>47%</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] 20-24%</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"> To retire the modular and formulate a concrete plan for building expansion to accommodate our long term goals. 	Year Ending	6/30/22		#'s in 000's	Revenues	\$2,832	Expenses	\$2,857	Net Income	(\$25)	Fund Balance, \$	\$1,343	Fund Balance, %	47%	G	25%>	Y	[between] 20-24%	R	19%<	G		Y	[between]	R		<p>Rocks Quarterly Priorities & Accountability: Jul-Sep 2019</p> <ol style="list-style-type: none"> Revisit the Prefeasibility study and discuss our action plan going forward. Have Strategic Planning Meeting for 21-22 school year Adherence to any COVID protocols put forth by the State of MI and/or HHS Determine positions (VP, Treasurer, Secretary) for Board Members in the 21-22 school year Alumni Event Planning <p>Quarterly Theme Launch Academic Year</p>
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