



# 1-Page Strategic Plan

Date: September 17, 2018

S.W.O.T. Analysis			
Strengths	Weaknesses	Opportunities	Threats

Core Values Should/Shouldn't: Forever	Purpose (Why) 10-30 Years	Targets (Where) 3-5 years	Goals (What) 1 year	Actions (How) Quarter																																		
<p><b>Compassion</b> Open and committed to understanding and supporting one another</p> <p><b>Curiosity</b>  Inquisitive beyond established frameworks</p> <p><b>Creativity</b> Originality and fostering of ideas</p> <p><b>Inclusive</b>  Share and receive towards understanding</p> <p><b>Integrity</b> Open, honest, and accountable</p> <p><b>Living the Values &amp; Purpose</b> <i>Discussed every quarter - do we walk the talk?</i></p>	<p><b>Love of Learning. Freedom to Fly.</b></p> <p><b>BHAG</b> <i>Big Hairy Audacious Goal</i></p> <p>100% of Montessori trained staff. Become Montessori model for public charter schools. An established training center for Montessori certification.</p> <p><b>Brand Promise</b></p> <ul style="list-style-type: none"> <li>Develop curiosity, creativity and character</li> <li>Foster independence and social responsibility within a community framework</li> <li>Inspire the love of learning independently and collaboratively</li> <li>Highlight global justice, fairness and peace</li> </ul> <p><b>KPIs</b> <i>Kept Promise Indicators</i></p> <p>Behavior/Discipline Trends Staff Retention Enrollment attrition World-beyond-our-door Student Exposure</p>	<p>Future Date: July 1, 2021</p> <p>Fund Balance</p> <p><b>Sandbox</b></p> <p>Public Montessori education for Y5-8 grade students living in northern Ottawa and southern Muskegon counties.</p> <p><b>Critical #:</b></p> <table border="1"> <tr><td>G</td><td></td></tr> <tr><td>Y</td><td>between minimum and goal</td></tr> <tr><td>R</td><td></td></tr> </table> <p><b>Critical #:</b></p> <table border="1"> <tr><td>G</td><td></td></tr> <tr><td>Y</td><td>between minimum and goal</td></tr> <tr><td>R</td><td></td></tr> </table> <p><b>Key Thrusts/Capabilities</b> <i>3-5 Year Priorities</i></p> <ol style="list-style-type: none"> <li>Establish and achieve educational standards above and beyond the regulatory requirements through Montessori application and practices.</li> <li>Top Montessori Certified Teachers seek us out because of: 1) The community/culture we have created through our values and sustainable practices in development &amp; compensation.</li> <li>Financial health sustainability models for enrollment under 234, breakeven @ 234, and max# of 300. (facility, staff, annual enrollment)</li> <li>Create physical environment that mirrors the core values (garden, meadows, modular, shared spaces, etc.)</li> <li></li> </ol>	G		Y	between minimum and goal	R		G		Y	between minimum and goal	R		<p><b>Year Ending</b> 6/30/19</p> <p>#s in 000's</p> <table border="1"> <tr><td>Revenues</td><td>\$2,372</td></tr> <tr><td>Expenses</td><td>\$2,360</td></tr> <tr><td>Net Income</td><td>\$12</td></tr> <tr><td>Fund Balance, \$</td><td>\$825</td></tr> <tr><td>Fund Balance, %</td><td></td></tr> </table> <p><b>Critical #: Enrollment #'s</b></p> <table border="1"> <tr><td>G</td><td>&gt;250</td></tr> <tr><td>Y</td><td>[between] 235-249</td></tr> <tr><td>R</td><td>234&lt;</td></tr> </table> <p><b>Critical #:</b></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><b>Key Initiatives</b> <i>Annual Priorities</i></p> <ol style="list-style-type: none"> <li></li> <li></li> <li></li> <li></li> <li></li> </ol>	Revenues	\$2,372	Expenses	\$2,360	Net Income	\$12	Fund Balance, \$	\$825	Fund Balance, %		G	>250	Y	[between] 235-249	R	234<	G		Y	[between]	R		<p><b>Rocks</b> Quarterly Priorities &amp; Accountability: Oct-Dec 2018</p> <ol style="list-style-type: none"> <li><b>Building/Construction</b> - determine how best to align to our Key Thrust #4.             <ol style="list-style-type: none"> <li>Feasibility Study - Sierra will put together and bring to April meeting feasibility process, timeline and costs to hire outside party or to do ourselves. April meeting board will decide what to do. May meeting board will review feasibility study results.</li> <li>Proposed Bidding Timeline - Finance Committee will work with attorney to get a proposed bidding timeline and estimate costs associated with oversight of that process. Information will be brought to April board meeting and inform broader budgeting process.</li> </ol> </li> <li><b>Finance Committee</b> - 2019-2020 budget             <ol style="list-style-type: none"> <li>Present proposed budget in May meeting with narrative</li> <li>Board approves budget in June meeting</li> </ol> </li> <li><b>Director Performance Review</b> <ol style="list-style-type: none"> <li>Staff Feedback initiated by Becky Andree on March 25th. Feedback consolidated by end of April.</li> <li>Becky Andree to send Parent survey to go out. May 1st.</li> <li>Mark Roessing to provide academic data to support Board evaluation by June 7</li> <li>Becky Andree to send Board survey June 7.</li> <li>Board reviews summary of performance and discusses with Mark in June board meeting.</li> </ol> </li> <li>Board agrees to date/time for Strategic Planning Work Session in July. Member of board secures a location for strategic planning session.</li> <li>WG Director Priorities - Title 1 Audit, Oversee Spring Assessments, School Improvement Plan, Year End Duties, 2019-2020 Budget, June Board review of academic progress</li> </ol> <p><b>Quarterly Theme</b></p>
G																																						
Y	between minimum and goal																																					
R																																						
G																																						
Y	between minimum and goal																																					
R																																						
Revenues	\$2,372																																					
Expenses	\$2,360																																					
Net Income	\$12																																					
Fund Balance, \$	\$825																																					
Fund Balance, %																																						
G	>250																																					
Y	[between] 235-249																																					
R	234<																																					
G																																						
Y	[between]																																					
R																																						