

## Gloucester Montessori Strategic Plan: 2015 – 2018

### Goal: Advancement: Fundraising, Admissions, Marketing

OBJECTIVE	ACTIONS/TASKS	RESPONSIBLE ENTITY/PERSON	TIME LINE	COST	REVENUE SOURCE	CRITERIA FOR EVALUATION
Develop a Great Marketing Plan	Establish a marketing committee to investigate developing a marketing plan perhaps with the aid of a consultant	Marketing committee	2015	Time; Cost for consultant	N/A	Does plan include outreach towards desired groups in our community? Is it a sustainable plan?
Implement Great Marketing Plan	Implement tasks identified in marketing plan (TBD)	Marketing committee; staff	2016-2018	Time; Costs for ads and marketing materials	Operating budget	TBD
Develop a Great Marketing Plan	Establish a protocol for reviewing public communications	Marketing committee and staff	2015	Time	N/A	Is protocol being followed?

### Goal: Education: Support the Whole Child

OBJECTIVE	ACTIONS/TASKS	RESPONSIBLE ENTITY/PERSON	TIME LINE	COST	REVENUE SOURCE	CRITERIA FOR EVALUATION
Provide Upper Elementary Education	Investigate feasibility: staff needs, student enrollment projections, classroom space needs	Pat Landau and staff	2015	Time	N/A	Has report been created?
Provide Upper Elementary Education	If moving forward: Develop long-term strategy for space, teachers, supplies, and funding	Pat Landau, Board of Directors, Financial Director	2015	Time	N/A	Has plan been created?
Provide Upper Elementary Education	If moving forward: Develop a transition plan for the next 3 years	Pat Landau, teachers, staff, Board of Trustees	2016-2018	Time	N/A	Has transition plan been implemented? Are there unseen barriers to implementation?

**Goal: Finance: Management of Money**

OBJECTIVE	ACTIONS/TASKS	RESPONSIBLE ENTITY/PERSON	TIME LINE	COST	REVENUE SOURCE	CRITERIA FOR EVALUATION
Establish and Maintain Financial Security	Develop a financial strategic plan that includes maintaining our excellent teachers and staff	Finance committee of Board of Trustees and Financial Director	2015	Time	Operating budget once policies are in place	Has financial plan been developed? Has salary/benefit package remained competitive with similar schools?
Establish and Maintain Financial Security	Create a reserve policy and establish a plan to fund it	Finance committee of Board of Trustees and Financial Director	2015	No cost until reserves are funded	Operating budget once policies are in place	Has policy been implemented? Has implementation plan been completed?
Establish and Maintain Financial Security	Fund reserve policy	Financial Director	2015-2018	TBD based on policy	Operating budget	Has policy been implemented? Is it sustainable?
Establish and Maintain Financial Security	Determine policy and percentage of hard income for operations	Finance committee of Board of Trustees and Financial Director	2015	No cost until reserves are funded	Operating budget once policies are in place	Has policy been implemented? Is it sustainable?
Establish and Maintain Financial Security	Create policies to support continuing education/professional development as regular budget items	Finance committee of Board of Trustees and Financial Director	2015	No cost until items are funded	Operating budget once policies are in place	Has policy been created?
Establish and Maintain Financial Security	Include line item(s) in budget for professional development	Financial Director	2015-2018	TBD based on policy	Operating budget	Has policy been implemented? Is budget item funding the needed professional development?
Establish and Maintain Financial Security	Determine policy for investments and banking practices	Finance committee of Board of Trustees and Financial Director	2015	Time	Operating budget once policies are in place	Has policy been created?
Establish and Maintain Financial Security	Implement investment and banking policies	Finance committee of Board of Trustees and Financial Director	2015-2018	TBD based on policy	Operating budget	Has policy been implemented? Is it sustainable?

**Goal: School Community**

OBJECTIVE	ACTIONS/TASKS	RESPONSIBLE ENTITY/PERSON	TIME LINE	COST	REVENUE SOURCE	CRITERIA FOR EVALUATION
Legacy building through the cultivation of the alumni community	Create an alumni database containing contact and biographical info (e.g., graduation year, achievements, etc)	Staff	2015-2016	Time + database costs????	Operating budget	Has database been completed? Is it being used? How can it be improved?
Legacy building through the cultivation of the alumni community	Use alumni database as a tool to publicize alumni successes on our web site, newspaper, newsletter, and/or Facebook as part of our marketing plan	Staff, marketing committee	2015-2018	Staff time; newspaper, newsletter publication costs (~1000/year??)	Operating budget	Number of articles published/school year; number of alumni attending/visiting/contacting school
Legacy building through the cultivation of the alumni community	Use alumni database to expand the number of annual appeals sent, invitations to events, invitations to connect with school via volunteer tasks, speaking, etc.	Staff, Board of Directors, marketing committee, Pat Landau	2015-2018	Staff time	Operating budget	Is info in database current? How many alumni attend an event/visit the school/help out in any way?

**Goal: Facilities**

OBJECTIVE	ACTIONS/TASKS	RESPONSIBLE ENTITY/PERSON	TIME LINE	COST	REVENUE SOURCE	CRITERIA FOR EVALUATION
Improve school facilities	Form a committee to investigate options for the unused trailer	Board of Trustees	2015-2018	Time	N/A	Has a plan been created that will ensure that the former trailer space can be utilized by the school in the future?
Improve school facilities	Address physical visibility of school through landscaping, lighting, signage	Board of Trustees; PTO	2015-2018	Cost of signage, lighting, landscaping, etc.	Operating budget	Is the school more visible? Has lighting, landscaping, and/or signage been installed?