

Strategic Plan 2011-2016

In the fall of 2010, the Casa di Mir board initiated the process of creating a strategic plan to establish priorities for the next five years. At the board's annual retreat in January, consultants Debbie Freed and Lucinda Lee Katz led the board through a process to help identify key strategic initiatives and outlined the course of action for developing the plan.

A Steering Committee was formed to oversee the development of the plan. Task force groups were created to focus on four major areas: Governance, Enrollment and Retention, Faculty and Staff Development, and Financial Sustainability. Parent and staff focus groups were held and a parent survey distributed in order to solicit input from staff and parents.

The task force groups reviewed staff and parent input, and made specific recommendations to the Steering Committee. The strategic initiatives outlined below are the result of this very thorough planning process. The Steering Committee hopes that this will be a living document, supported by the entire Casa community.

At the annual board retreat, Lucinda Lee Katz referenced the following Greek proverb: "A civilization flourishes when people plant trees under which they will never sit." At this pivotal time in Casa di Mir's history, we bear this proverb in mind as we work to ensure the health, stability and longevity of our very special learning community for generations to come.

Financial Sustainability

As one of only a very few schools in the area offering an authentic Montessori education, Casa di Mir provides a unique educational environment for south bay children. Casa di Mir is an exemplary school in every way but one: our financial resources. As we sit poised at our next phase of growth, we must act now to secure the school's long term sustainability.

Our current, leased facility does not adequately meet our growing needs, especially in regard to the outdoor environment. Our elementary enrollment is strong, and there is significant interest in a middle school program. The time has come to pursue our dream of building and owning our own campus, a facility that we can tailor to best meet the needs of our students. In order to do this, it will take enormous commitment from all of us – board, staff and parents.

Goal: Work toward purchasing property on which to build a new school campus with adequate outdoor space for approximately 200 students, age 2.6 through 14 years.

Goal: Construct a long- term financial plan that includes new school construction.

Goal: Maintain the goal of the previously approved 5-year plan towards a balanced budget independent of fundraising revenue by 2014.

Cost: \$5-7 million

Responsible Parties: Board of Directors, Site Committee, Head of School

Task to be accomplished by: 2014

Governance

In order to accomplish the goals and objectives set forth in the strategic plan, it will be imperative that the Casa di Mir Board of Directors has a structure in place that supports shared leadership and ensures that each board member is active and engaged. The board composition should be strengthened, both in size and expertise, to be positioned to play a more active leadership role. Active board committees should meet regularly in order to work towards strategic goals.

Goal: Structure the Board for empowerment and efficiency.

In order to attain this goal, the board will establish the following board committees and define goals for each:

Board Development Committee

- Nominating and orientation of new board members
- Increase board membership to 11. (Profiled board with specific skills)
- Establish self review and evaluation process
- Plan board education activities and workshops

Head of School Committee

- Evaluation and salary review
- Succession planning

Finance Committee

- Budget and tuition recommendations
- Review investments and make recommendations

Advancement Committee

- Fundraising – internal and external
- Marketing/community relations

Site Committee

Some committees will be open to past and current parents who are not board members.

Implementation date: Committees will be formed by June 2012.

Person responsible: Board President and Head of School

Cost: \$10,000 estimated (For consultants and training fees)

Goal: Prepare for a capital campaign for new campus construction

1. Hire and train Development Director. (Completed 8/2011)
2. Interview and choose a capital campaign consultant.
3. Conduct a feasibility study.
4. Create a plan for the capital campaign.

Task to be accomplished by: September 2012

Person Responsible: Board, Head of School, Development Director

Cost: \$40,000 (Part time salary, training, consultant fees)

Goal: Review, amend, and submit revision of bylaws, including longer term for board members.

Task to be accomplished by: June 2012

Person responsible: Board President

Cost: N/A

Enrollment and Retention

Consistently attaining full enrollment is critical in order to provide the resources needed for our strategic initiatives. As part of the strategic planning process, current parents were surveyed in order to obtain information on programmatic areas where change or improvement is desired. The following goals were developed in order to maximize enrollment of new students and retention of current students.

Goal: Develop and Expand Internal and External Marketing Campaigns

1. Improve Parent Education Program
 - Schedule parent education speaker once or twice per year; market the event to the broader community.
 - Disseminate articles with a Montessori focus.
 - Increase attendance at parent education events.

Implementation date: 2011-12 School Year

Person responsible: Head of School

Cost: \$2,000 (Speaker fees, child care)

2. Host events for local community to increase exposure.

Implementation date: 2011-2012 school year

Person responsible: Development Director

Cost: Unknown

3. Improve social media presence by launching a Facebook page.

Implementation date: January, 2012

Person responsible: Development Director

Cost: N/A

Goal: Enhance Alumni Outreach and Engagement

1. Update and maintain comprehensive alumni database.
2. Host annual alumni panel for current families.
3. Highlight alumni achievements in newsletters.
4. Host alumni functions to keep alumni connected to Casa.
5. Involve alumni in marketing events.

Implementation date: 2011-12 school year

Person responsible: Development Director

Cost: N/A

Goal: Program Development

Primary program:

1. Expand the Primary day to start at 7:30 am.

Implementation start date 8/31/2011. This initiative is expected to pay for itself with extended care revenue.

2. Provide a 6-week summer program to Primary families.

Implementation date: Summer 2012.

Person responsible: Cathy Williams, Primary Director

Cost: This initiative is expected to generate revenue.

3. Research expected use and cost of providing child care during breaks and other non-school days.

Task to be completed by: June 2012.

Person Responsible: Business Manager

Cost: Projected revenue would likely equal or exceed projected cost.

Elementary program:

1. Developing and expanding the Spanish curriculum

Implementation: September 2011

Person responsible: Head of School

Cost: Unknown – potential costs include increased payments to contract Spanish teacher if hours are expanded.

2. Evaluate and assess the current PE program
 - a. Improve communication with parents about the current program.
 - b. Add a health and nutrition component to the program.

Implementation: September 2011

Person Responsible: Head of School

Cost: Unknown – probably negligible.

3. Evaluate the extended day program.
 - a. Increase the number of after school program options.

Implementation: 2011-2012 school year

Person Responsible: Head of School

Cost: Possible loss of income from our extended day program, if students are enrolled into programs provided by outside vendors. Explore the possibility of charging outside vendors a use fee to hold classes on site at Casa di Mir.

4. Research expected use and cost of providing child care during breaks and other non-school days.

Task to be completed by: June 2012.

Person Responsible: Business Manager

Cost: Projected revenue would likely equal or exceed projected cost.

Faculty and Staff Development

Casa di Mir's greatest asset is its faculty. We endeavor to attract and retain the highest caliber teaching staff. In order to do this, we must provide salary and benefits comparable to other local independent schools, support ongoing professional development and opportunities for growth and leadership. In addition, we must plan now for a successful transition of leadership when our current founder and head retires in the next 5-10 years.

Goal: Develop a model to encourage a culture of professional development and provide opportunities for leadership.

1. Develop a statement of professional development expectations for the employee handbook.
(Completed 7/2011 by Business Manager, see attached.)
2. Review the model at staff meetings and in individual goal-setting meetings annually.

Cost: Increase of \$10,000 to Professional Development budget.

Goal: Review and evaluate salary, benefits, and teacher preparation time.

1. Compare current salaries with similar size independent schools and public schools in the SF Bay Area.
2. Review and restructure paid sick and vacation in order to reward longevity.
3. Research cost and design of retirement benefit.
4. Consider increase to FSA.
5. Prepare estimate of costs for life insurance and short term disability.

Task to be accomplished by: June 2013.

Person responsible: Business Manager

Cost: TBD

Goal: Create and maintain an organizational infrastructure that maximizes effectiveness and efficiency in delivering programs. Assure planning and preparation for smooth leadership and long term faculty and staff transitions.

1. Hire Development Director (2011-12)
2. Hire Assistant Head of School (2012-2013)
3. Hire additional office personnel (2012-2013)
4. Hire Facilities Maintenance Supervisor (TBD)

Person Responsible: Head of School

Cost: Upon full implementation, approximate increase of \$200,000 to salaries/benefits.