

Bloomington Montessori School  
Strategic Plan 2023-2026

**Mission.** To guide students from self-discovery to global citizenship through Montessori education

**Vision.** To become a center for peace and education within our community

**Values.** At Bloomington Montessori School we value...

- A love of learning
- Nurturing peaceful, self-reliant, empowered citizens
- Care for ourselves, each other, and the Earth
- Open and honest communication
- Working hard and working together as a welcoming community
- Awareness and appreciation of all the ways in which humans are diverse and actively working toward equity

**Background.** Bloomington Montessori School (BMS) is in its 55th year of operations as a not-for-profit Montessori school. BMS is a member of the American Montessori Society (AMS) and is fully accredited. The school conducts strategic planning on a 3-year cycle to comply with AMS requirements, adhere to the school's mission, and work toward long-term financial security and implementation of the school's vision.

**Governance.** Bloomington Montessori School is governed by a Board of Directors. The Board of Directors was restructured in 2019-2020 to meet AMS best practices. It consists of four executive positions and five to seven at-large positions in addition to the Head of School, who is a non-voting member. At least 60% of the voting Board must be parents of current students. The Board does not directly involve itself in day-to-day operations. It conducts operations oversight, ensures that the school is meeting its mission, and plans for and protects the overall well-being of the organization. Work of the Board is conducted through standing committees, with all policy changes or operations changes subject to review by the full Board.

**Plan Development.** The current strategic plan was developed between January and May, 2023, and was formally approved at the May 2023 meeting of the Board of Directors. The plan is divided into sections according to working groups within the school. This format reflects the current working structure of the Board and Administration. Sections of the plan include: Operations - Curriculum; Operations - Organization; Executive; Finance; Governance; Development; Community/Parent Action Committee; and Value Alignment.

In reading the sections of the plan included below, "Focus Areas" refer to broad themes that were prioritized by each working group for the current three-year plan. "Projects" outline the specific steps that will be taken in each focus area. "Schedule" refers to the year or years (2023-2026) in which the primary work of each project will be completed. "Start" following a year means that the project is a new annual practice.

**Operations-Curriculum.** This section of the plan outlines goals for the next three years in relation to curriculum development, assessment, and alignment with AMS standards. The Operations-Curriculum section is executed and maintained by the Head of School and Assistant Head of School and lead teachers, with oversight by the Executive Committee.

Focus Area	Project	Schedule
Reading	"Reading Rope" training for all teaching staff	2023-2024
	Formative and Generative Assessment Strategies training	2024-2025
	Formative and generative assessment audit	2025-2026
Mathematics	Stanford YouCubed professional development (two courses)	2025-2026
	Address concept gaps; audit formative and generative assessment implementation and application.	2025-2026
Writing	Formative and generative assessment PD	2025-2026
	Audit of formative and generative assessment practices	2025-2026

**Operations - Organization.** This section of the plan outlines goals for the next three years in relation to management of the overall organization, including management of staff, facilities, enrollment, parent relationships and communication, and community relationships. The Operations-Organization section is executed and maintained by the Head of School and Assistant Head of School and lead teachers, with oversight by the Executive Committee.

Focus Area	Project	Schedule
<b>Staff</b>	Exit survey and year-to-year data	2023-2024
	Staff communication	2023-2024
	Benefits review and steps and lanes review	2025-2026
<b>Enrollment</b>	Increase student diversity	2023-2024
	Consistently institute exit surveys as part of the withdrawal process	2023-2024
	Investigate and implement extracurriculars for elementary students	2023-2025
<b>Communication</b>	Consistent Social Media presence	2023-2024
	website review and revisions	2023-2024
	Evaluate FACTS app for families	2023-2024
	Build culture of higher response rate for surveys and receptive and expressive communication engagement	2023-2026
	Parent Engagement improvements (volunteering, parent forums, etc.)	2023-2026

	Parent/Family, create new opportunities/events to foster community	2023-2024
<b>Professional Partnerships</b>	IU Teacher Education Program Exploration	2023-2024
	Begin process for AMS renewal (due 2028)	2025-2026
<b>Facilities</b>	Evaluate annex carpeting	2024-2025
	Whole-school paint touch-up	2024-2025
	New furniture for hickory	2023-2024
	Replace fire escape	2023-2024
	Evaluate solutions for flooding in the side yard and lower playground.	2025-2026

**Executive.** The Executive Committee comprises the four executive Board positions, one at-large member, and the Head of School. This committee directly manages the Head of School and Assistant Head of School positions, oversees and advises operations management, creates operations-related policies, and oversees strategic plan progress.

<b>Focus Area</b>	<b>Project</b>	<b>Schedule</b>
<b>Plan Oversight</b>	Framework for mid-year and annual progress reports	2023-2024
	Mid-year check-in for all plan areas	2023-2024
	Annual review	2023-2024 start
	RACI assignments in committee for better work distribution	Start 2023
	Values alignment page per work area with planning guide	2023-2024
<b>Policies/Forms Alignment</b>	Tandem handbooks review for clarity and consistency	2024-2025
	Process to make updates across all handbooks simultaneously	2024-2025
	Review parent forms for clear and accurate policy information	2024-2025
	Review processes around permission forms and information dissemination to consider varying family needs	2024-2025
	Sustainability project: Maximize use of FACTS/Google Forms	2025-2026
	ABAR project: Review and edit forms for inclusive language	2024-2025
	Review policies and forms to ensure that Montessori method is centered and referenced	2024-2025
<b>Consistency</b>	Collaborative community calendar for meetings and events	May 2023 start
	Develop transition documents for all 4 executive BOD positions	2023-2024
	Document communication and decision-making practices	2023-2024

	Institutional knowledge document with 5-7 years of school history	2023-2024
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**Finance.** The Finance Committee comprises the President, Treasurer, Head of School, Accountant, and at least one at-large Board member. This committee oversees budget development, maintenance, and audits, creates investment and financial management policy, and advises the Board on expenditures and investments.

Focus Area	Project	Schedule
<b>Investment</b>	Finalize investment policy	2023-2024
	Select investment advisor and develop plan	2023-2024
	Monitor investment performance	2023 start
<b>Education</b>	Develop FAQs and post to website	2023 start
	Post Form 990 to website within 30 days of filing; add link to profile on <a href="https://www.guidestar.org">Guidestar.org</a>	2023 start
<b>Scholarships</b>	Develop scholarship policy document	2023-2024
	Increase advertising efforts to attract applicants	2023 start
	Create funding plan with investment advisor	2025-2026
<b>Record Organization</b>	Create policy governing document retention and management	2023-2024
	Review physical records and convert to electronic as appropriate	2023-2024
	Reorganize Google Drive to avoid duplication	2025-2026

**Governance.** The Governance Committee comprises the Vice-President, Secretary, Head of School, and at least one at-large Board member. This committee is responsible for creating Board-related policies, Board recruiting (through the Nominating sub-committee), onboarding and member management, Board assessment, and compliance with AMS guidelines and best governance practices.

Focus Area	Project	Schedule
<b>Board Evaluation</b>	Creation of mid-year survey and end of year survey to evaluate progress on strategic goals and committee goals	2023-2024
	Major board survey repeated	2024, 2026
	Intra Committee Survey	2023 start
	Annual check-in with individual board members	2023 start
<b>Expectations and Accountability</b>	Expectations document to be signed at Board orientation annually	2023-2025
	Bylaw additions and clarifications on adding and removing members as needed	2023-2025
<b>Practical knowledge and relationship development</b>	Orientation documents on classroom structure, recent school history, practical Montessori information	2023 start

	Regular social events for Board, Staff, Admin	2023 start
<b>Succession Planning</b>	Workload documents for transparency on officer duties	2023-2024
	Recruit backups for all officer positions	2023-2025
	Intra Committee Survey	2023 start
	Annual check-in with individual board members	2023 start

**Development.** The Development Committee comprises a member from the Finance Committee, a member from the Governance Committee, a member of the Administrative team, at least one at-large Board member, and at least one current non-Board parent. This committee is responsible for overseeing development campaigns and other fundraising activities, allocating contributions to the school in alignment with the mission and vision of the school, and planning how contributions can help the school to meet long-term goals.

<b>Focus Area</b>	<b>Projects</b>	<b>Schedule</b>
<b>Building community relationships</b>	Alumni newsletter to be released 3 times annually	2023-2024
	“Legacy” packet for graduating students at all levels	2024-2025
	Front load development with start of year email, event calendar	2023 start
	Build development information into existing events	2023-2024
	Development questions on the Annual Survey to assess understanding and interest from parents	2023 start
	Offer newsletter & sponsorships to alumni-affiliated businesses	2025-2026
<b>Marketing</b>	Develop branding package for BMS	2023-2024
	Develop blog with external target audiences	2024-2025
	Clean up website	2023-2024
	Revise development area of website with new graphics, funding transparency, current projects, sponsor appreciation area	2024-2025
	Revise school brochure	2024-2025
	Revise annual report for visual appeal/use in donor asks	2024-2025
<b>Internal Organization</b>	Consider semi-annual school "magazine" for asks & alumni	2025-2026
	Intern to build/maintain alumni and development databases	2023-2024
	Improve photo management storage, policy, & procedure	2023-2024
	Complete full RACI analysis for strategic plan	2023-2024
	Review and revise current policy as needed	2024-2025
	Consistent Development framework with rubrics for each event type	2024-2025

<b>Scholarships</b>	Increase awareness through newsletters and social media	2023–2024
	Publicize percentage of Annual Fund dollars to scholarship fund	2023-2024
	Devote an ongoing fundraiser for scholarship funding	2023-2024
	Consult financial advisor on investment options for scholarships	2023-2024
	Research scholarship programs at other Montessori schools	2024-2025
	Submit long-term scholarship plan for BOD approval	2025-2026

**Community/Parent Action Committee.** The Parent Action Committee (PAC) is collaboratively led by one Board member and one non-Board current parent. PAC is not a standing committee, and was created in order to provide a vehicle for organizing community-led activities and parent volunteer work. PAC chairs work closely with the Head of School and Office Assistant and report on events and planning to the Board.

<b>Focus Area</b>	<b>Projects</b>	<b>Schedule</b>
<b>PAC Purpose</b>	Project 1: S.W. O.T. Analysis	2023-2024
	Project 2: Refine/articulate purpose, mission and vision	2023-2024
	Project 3: National PAC Society membership/ Landscape Assessment	2024-2025
<b>Improve Parent Participation</b>	Project 4: Callout Sessions	2023-2024
	Project 5: Streamline Number of Meetings	2024-2025
	Project 6: New Parents Official Welcome	2023 start
<b>Finances</b>	Project 7: Increase BOD budget line item	2024-2025
	Project 8: Fundraising Inclusion Opportunities	2025-2026
<b>Communication</b>	Project 9: Centralize communication delivery	2024-2025
	Project 10: Create PAC Information Portal	2025-2026
	Project 11: Intern	2025-2026

**Values Alignment.** The Values Alignment section of the strategic plan ensures that the actions taken by the school reflect and advance the school’s values. In the current strategic plan, sustainability, diversity and inclusion, and holistic education receive particular focus. The Executive Committee collaborates with the administration to track values alignment across all committees and projects.

<b>Focus Area</b>	<b>Projects</b>	<b>Schedule</b>
Campus Sustainability	Evaluate solar possibilities	2023-2024
	Waste reduction efforts	2024-2025
	Water and electric conservation campaign for school with family and community engagement programs.	2025-2026

Nurturing Peaceful, Self-Reliant, Empowered Citizens	Hire interventionist for struggling students 15 hours per week, increasing to 20 hours a week the following year. Reading, math, work habit and behavioral support.	2023-2024
	Evaluate options for a staff counselor for group and individual sessions for struggling students.	2024-2025
Diversity and Equity	DEI survey and demographic review baseline	2023-2024
	Equity audit	2023-2024
	Multicultural education staff PD	2024-2025
	DEI Survey (progress monitoring)	2025-2026