

# Sterling Montessori Academy and Charter School 2008-2012 Strategic Plan



*Sterling Montessori Academy and Charter School*  
202 Treybrooke Drive, Morrisville, NC 27560  
Tel. 919.462.8889, Fax: 919.462.8890

Adopted by the  
LHU Foundation Board of Directors  
January 21, 2009

# LHU Foundation Board of Directors

## January 2009

Sharmila Bristol, President

Pantea Dougani, Vice President, Co-Chair, Strategic Planning Committee

Alexis Schauss, Treasurer, Chair, Finance Committee

Cristina Gillanders, Secretary

Lori Christian, Director

Geri Lewis, Director

Shari Padgett, Director, Chair, Building Committee

Saiid Davari, Director, Chair, Strategic Planning Committee

Timothy Barker, Director

## History and Background

In 1993, the Laura Holland Uzzell Foundation made Montessori Style education available for children in the NC Triangle Area beginning with children three to five years of age. As the success of the school grew, so did the educational program offerings. Sterling Montessori Academy and Charter School expanded from a private pre-school academy to a public charter elementary and middle school, offering a high-quality Montessori education for students ages 3 through 14.

Governed by the volunteer LHU Foundation Board of Directors and under the leadership of Executive Director Bill Zajic, Sterling Montessori Academy and Charter School remains committed to the philosophy of Maria Montessori.

## History and Background: The Strategic Plan

In the spring of 2008, the LHU Foundation Board of Directors began the process of developing a comprehensive strategic plan that would insure the school's continuing success and commitment to the Montessori philosophy, while accommodating significant growth in the student body. Simultaneously, plans for expanding the campus were led by Brown Architecture and Giamportone Design.

The LHU Foundation Board of Directors engaged Lilly Skok Bunch Consulting, Inc. to facilitate the strategic planning process and to collaborate with the Design Team to ensure that new building and site design were driven by a unified strategic vision for the campus. Under the leadership of the LHU Foundation President, Sharmila Bristol, a Strategic Planning and Design Committee was established representing members of the Board, faculty, staff and parents who would be charged with leading the strategic plan and guiding the design plans.

# The Strategic Planning and Design Committee

## January 2009

Sharmila Bristol, President, LHU Foundation Board of Directors

Saiid Davari and Pantea Dougani, Strategic Planning Committee, LHU Foundation Board

Shari Padgett and Bill Davis, Building Committee, LHU Foundation Board

Alexis Schauss, Finance Committee, LHU Foundation Board

Bill Zajic, Executive Director, Sterling Montessori Academy and Charter School

Jill Stansbury, Carrie Smith, Matt Oberst and Ursula Thompson, Sterling Faculty & Staff

Lorraine McCurdy and George Rapp, Sterling Parent Representatives

Charles Brown and Keith Giamportone, Architecture and Design Team

Lilly Skok Bunch, Lilly Skok Bunch Consulting, Strategic Planner

Sterling Montessori Academy & Charter School Mission Statement  
Adopted by the LHU Foundation Board of Directors  
June 18, 2008

Sterling Montessori Academy and Charter School is a diverse educational community built on the Montessori philosophy that fosters curiosity, creativity, and critical thinking in its students. At Sterling, teachers follow students' individual needs to achieve personal academic excellence and to become life-long learners who respect themselves, others and their environment.

# Sterling Montessori Academy and Charter School

## Guiding Principles, Adopted June 18, 2008

1. Sterling Montessori will nurture in its students a life-long love of learning and respect for themselves and others in a “peaceful” and safe environment.
2. The philosophy of Maria Montessori will be the cornerstone of the educational programs at Sterling Montessori while complying with the requirements of the North Carolina Department of Public Instruction and Office of Charter Schools.
3. The Sterling Montessori campus will be artistically beautiful and will be an interactive extension of the classroom by offering a “prepared” and sustainable environment for students.
4. Sterling Montessori will be a community where the voices of the students, faculty and parents are valued equally, and all members of the community are welcome to actively participate.
5. Sterling will have a strong management team, led by the Executive Director, which will create sound procedures guided by established policies that will ensure a safe environment for all.
6. Sterling Montessori will be committed to responsible growth driven by genuine Montessori practices, financial sustainability and the collective needs of the community.

Guiding Principle # 1: Sterling Montessori will nurture in its students a life-long love of learning and respect for themselves and others, in a “peaceful” and safe environment.

- a) Faculty guide students’ natural curiosity in order to achieve a life-long love of learning guided by the needs of the whole child in a prepared environment.
- b) Faculty follow the individual needs of children, parents, and each other while taking into account the needs of the whole community.
- c) Parents are educated in the principles and application of THE MONTESSORI METHOD and are integrated into the educational process of their children. Parents are invested in the principles of Montessori and their children’s education.
- d) In order to create a peaceful community, Sterling consciously teaches its students to be peace makers and problem solvers.

Guiding Principle # 1: (continued) Sterling Montessori will nurture in its students a life-long love of learning, and respect for themselves and others, in a “peaceful” and safe environment.

- e) Classes are multi-aged in accordance with Montessori stages of development, creating natural mentorship opportunities and meaningful relationships.
- f) Sterling faculty will “follow the child”, will understand children and their potential and will build relationships with them based on genuine caring that creates trust.
- g) Sterling consciously teaches its students to reach out to the local and global community.

Guiding Principle # 2: The philosophy of Maria Montessori will be the cornerstone of the educational programs at Sterling Montessori while complying with the requirements of the North Carolina Department of Public Instruction and Office of Charter Schools.

- a) 100% (vs. 75% required) of K-6 lead teachers will be licensed by the state of North Carolina.
- b) 100% of K-6 lead teachers will be Montessori trained from a reputable, accredited institution.
- c) 50% of Middle School faculty will be licensed by the state of North Carolina.
- d) 25% of Middle School faculty will be Montessori trained from a reputable, accredited institution.
- e) 100% of lead teachers will be Highly Qualified (under the requirements of No Child Left Behind).

Guiding Principle # 2: (continued) The philosophy of Maria Montessori will be the cornerstone of the educational programs at Sterling Montessori while complying with the requirements of the North Carolina Department of Public Instruction and Office of Charter Schools.

- f.) 100% of specialists will be licensed in their curriculum area and encouraged to be educated in Montessori philosophy.
- g.) Sterling's curriculum and instruction will ensure success on required assessments for each student.
- h.) Parents and teachers will form effective partnerships to support students becoming life-long learners. Sterling values parents' diverse cultural backgrounds and experiences. Parents are informed about and value the principles and application of THE MONTESSORI METHOD.
- i.) Sterling will instruct students to attain personal educational goals.
- j.) Sterling is committed to continuous improvement in implementing the Montessori curriculum with integrity.

Guiding Principle # 3: The Sterling campus will be artistically beautiful and will be an interactive extension of the classroom by offering a “prepared” and sustainable environment for students.

- a) Interior spaces will be consistently functional by developmental level, artistically beautiful and thoughtfully maintained over time.
- b) The artistically beautiful campus will reflect human diversity, appreciation of art and students’ creativity.
- c) Educationally prepared outdoor environments will be created across campus that are engaging, enjoyable and encourage both physical and academic development.
- d) All classrooms will have clearly defined “outside” classroom extension space balanced by the needs of the overall site plan.

Guiding Principle # 3: (continued) The Sterling campus will be artistically beautiful and will be an interactive extension of the classroom by offering a “prepared” and sustainable environment for students.

- e) Principles of sustainable design will be used to attractively landscape and hardscape the campus.
- f) Age appropriate multi-use athletic/activity spaces will be developed that are functionally safe, sustainable and highly available to the community.
- g) A completed Master Plan will inform all site plan improvements and new construction and will create a sustainable “prepared” campus that brings existing elements together and forms a coherent campus.

Guiding Principle # 4: Sterling Montessori will be a community where the voices of students, faculty and parents are valued equally and all members of the community are welcomed to actively participate.

- a) Montessori principles of teamwork and collaborative problem solving inform interactions between members of the community.
- b) Families feel welcome to participate in the life of the school and volunteer at least 15 hours per year per child on campus.
- c) School-wide information is communicated in a timely and effective manner through the website, which is an effective tool for parents and faculty and for marketing the school.
- d) Clear and consistent messages will be delivered through diverse communication tools uniquely designed for each constituent group.
- e) “Pride” messages are communicated in order to create and foster pride in Sterling among all members of the community.

Guiding Principle No. 4: (continued) Sterling Montessori will be a community where the voices of students, faculty and parents are valued equally and all members of the community are welcomed to actively participate.

- f.) Faculty members will attend school-wide and section meetings unless engaged by other school activities, and minutes will be distributed to all who are in need.
- g.) PFA membership will be broad-based and representative of all members of the community.
- h.) Student performance feedback will be scheduled and clearly communicated to parents.
- i.) Activities that assist families with level transitions will be planned.
- j.) A freely elected student council will be organized and supported in order for all students to have a voice.
- k.) Community events will be held to develop relationships across the school, foster a school-wide community, and facilitate student, staff and parent interaction between classes and grade levels.

Guiding Principle # 5: Sterling will have a strong management team, led by the Executive Director, which will create sound procedures guided by established policies that will ensure a safe environment for all.

- a) The LHU Foundation Board will ensure that policies are in place to support effective and efficient operations and successful administration of the school. Policies will be in compliance with the financial and governance policies of the NC State Board of Education.
- b) The roles of the Board and the Executive Director will be clearly defined and respected. The LHU Foundation Board will act as the governing trustees of the school, focusing on policy and planning, in alignment with the mission of the school. The LHU Foundation Board will entrust management of the daily operations of the school to the Executive Director.
- c) The Executive Director and the administrative team will ensure necessary resources are available to support all employees.
- d) Sufficient and qualified employees will be in place to effectively administer the school.
- e.) The Executive Director will create a unified team around the goals of Sterling.

Guiding Principle # 5: (continued) Sterling will have a strong management team, led by the executive director, which will create sound procedures guided by established policies that will ensure a safe environment for all.

- f.) The Executive Director and the administrative team will ensure necessary resources are available to support all employees.
- g.) Sufficient and qualified employees will be in place to effectively administer the school.
- h.) Definitions of roles and responsibilities of employees will be clear and in writing.
- i.) An employee evaluation system will be established and implemented.
- j.) Communication with the administrative team and all school employees will be open and reciprocal, in an atmosphere of trust.
- k.) Employee and Parent Handbooks will clearly outline expectations and will be disseminated.
- l.) Site plan improvements will ensure safety for all members.

Guiding Principle # 6: Sterling Montessori will be committed to responsible growth driven by genuine Montessori practices, financial sustainability and the collective needs of the community.

- a) The future goal for class size will not exceed 25 students in the Academy and 28 students in Lower and Upper Elementary. Class size in the Middle School will ultimately not exceed 30 students per classroom.
- b) The total enrollment at Sterling will not exceed 734.
- c) The Sterling Master Plan will be reviewed and revised to include site plan improvements, and will be presented to the Town of Morrisville in 2009.
- d) Design and construction of additional classrooms will be actively pursued to replace the learning cottages.
- e) Design and construction of a multi-purpose facility will be planned to accommodate the needs of the school.
- f) All building design will encompass green principles that ensure sustainable construction.

Guiding Principle # 6: (continued) Sterling Montessori will be committed to responsible growth driven by genuine Montessori practices, financial sustainability and the collective needs of the community.

- g.) Sterling will annually allocate funds for deferred maintenance of the campus.
- h.) New revenue streams including public and private sources will be explored to support the strategic initiatives of Sterling.
- i.) A renewed culture of philanthropy will be established across the Sterling community.
- j.) The LHU Foundation Board will aggressively pursue plans to raise private funds to support the campus improvements.
- k.) Sterling will fund its growth by a combination of bond financing, philanthropy and by establishing community partnerships.
- l.) The debt ratio will not exceed 85%.

Guiding Principle # 6: (continued) Sterling Montessori will be committed to responsible growth driven by genuine Montessori practices, financial sustainability and the collective needs of the community.

- m) All governance decisions will be made proactively by monitoring the Average Daily Membership and its impact on budget and growth projections.
- n) The LHU Foundation Board will review its performance and the strategic plan annually. The membership will reflect the larger Sterling community, and the board will lead the community to achieve the strategic initiatives outlined in this plan.
- o) The LHU Foundation and the Sterling administration will assure that necessary resources are available to support the strategic initiatives outlined in the 2009-2015 Strategic Plan.