

Sterling Montessori Academy & Charter School Strategic Planning Report, September 2008

In the Spring of 2008, the LHU Foundation Board of Directors initiated a planning process to establish a Strategic Plan and building growth plan for Sterling Montessori Academy and Charter School.

Under the leadership of LHU Foundation Board President Sharmila Bristol, a Strategic Steering Committee was established with members representing the Board of Directors, faculty, staff and parents, who would be charged with strategic planning and involving the Sterling community in the process.

Phase One and Two: SWOT Analysis and Discussion Groups

Phase One of Strategic Planning involved community specific SWOT (Strength, Weaknesses, Opportunities and Threats) sessions conducted for parents, faculty and staff, students and the LHU Foundation Board of Directors. The SWOT analysis:

- 1.) Identify the most pressing and urgent needs as identified by each group. These identified needs and weaknesses would provide a list of issues that should be addressed in the Strategic Plan.
- 2.) Identify what each group (parents, faculty, board members, and students) believed were the greatest strengths of Sterling. The strengths would be reviewed to ensure that the current mission statement reflected an accurate articulation of what Sterling *is to its stakeholders*.
- 3.) Gauge the level of understanding of the threats facing Sterling and the opportunities present for the future.

The purpose of the SWOT process is to elicit the opinions of parents, students, faculty and staff and identify the similarities and differences.

Over 100 members of the Sterling community participated in the SWOT Analysis sessions, including parents, faculty, and students. There was general consensus among the various communities in identifying strengths and weaknesses.

Members of the Sterling Community are extremely committed to the school. They are grateful for the commitment of the faculty and staff, and their sincere investment in

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the children who attend Sterling. Members of the Sterling Community believe in the educational philosophy at Sterling and are impressed with the educational outcomes of their students.

In addition to identifying the unique qualities of a Sterling education, the SWOT Analysis brought forth key areas of frustration among the various constituent groups. They included challenges related to the impact of significant growth on campus, issues surrounding the Montessori curriculum at Sterling, and challenges in communication (both from the school and with the school).

Phase Two of the Strategic Plan began with Discussion Groups held with the same groups (parents, faculty and staff and board members) to analyze in detail common issues raised as a result of the SWOTs. Areas of discussion centered around the topics of Communication, Optimal class size, overall school size, student/faculty ratio, educator training; the needs for a multi-purpose facility and specific design elements needed in classroom and in campus spaces.

The Discussion Groups allowed time for members of the community to discuss the identified challenges in more detail and to offer ideas for possible solutions. Together, the SWOT data and Discussion Group data helped the Strategic Steering committee create the 6 Guiding Principles that will provide a framework for the Strategic Plan. Next, parents, Board Members and faculty and staff will establish strategies for accomplishing the goals outlined for Sterling.

General Summary:

Growth and its cost:

Sterling Montessori Academy and Charter School is a campus in transition. The campus has grown from approximately 400 to 630 in a short time. While the community generally understands that along with growth has come an increase in the number of children able to attend Sterling and increased financial security, there was general consensus among most groups participating that growth has taken a toll. Most importantly, there is the general perception that growth has not been “planned”, has occurred without regard for its impact on the school and its resources, and has cost the community some of the one-on-one personal attention that has been a hallmark of Sterling.

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The greatest losses related to growth includes an unclear sense of what is expected of parents and an unclear understanding of what expectations are of parents, students, faculty and staff. Many believe that rules are not followed consistently, or people are not clear what the rules or expectations are of them.

In the classroom, teachers don't know their students in the same way they used to. Parents don't know administrators, and administrators don't know parents. Parents generally feel unappreciated and unheard.

Communication Challenges:

The most passionately articulated weaknesses at Sterling were communication. Some parents feel that the school doesn't care or won't listen and respond to concerns.

Faculty and staff share the same belief concerning communication, which along with the perception of "unplanned growth" is impacting morale. Parents generally feel "unheard" (as a group and as individuals when problems are related to their children). This is only exaggerated by many of the challenges that have resulted from the growth and have gone unaddressed. (Examples include an inadequate website, car pool challenges, and safety on campus.

Montessori Philosophy on campus:

Each of the groups spoke passionately about the need to uphold Montessori - in its purest form - pervasively on campus. There are teachers at Sterling who parents hold in the highest esteem because of their Montessori training - And they will do anything to make sure that they are *their child has that teacher*. There is a perception that the quality of teachers varies a lot at Sterling, and parents want teachers who communicate well with parents, and therefore have a better relationship with their child as a whole.

Following the completion of the SWOT Analysis and after review of a comprehensive report from Lilly Skok Bunch, the following revised mission statement was adopted by the LHU Foundation Board of Directors:

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.

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The Mission Statement will be an important tool to explain to parents, faculty and staff what is important to the community, and to help make decisions in the future.

The Committee also conducted a comprehensive review of the weaknesses, threats and opportunities at Sterling and identified a list of themes that were seen as imperative to address in the Strategic Plan and use in establishing the Guiding Principles.

- Montessori as the driving philosophy at Sterling while upholding the requirements of the state charter
- Educational goals for students create life-long learners not “test-takers”
- Creating a campus environment that is an extension of the classroom, is sustainable and “prepared”
- Creating a community where all voices are heard and valued and all are encouraged to participate
- Attention on building infrastructure to support campus growth
- Growth driven by sustainability, Montessori practices and the wishes of the community

The Discussion Groups were held on campus to give the Sterling Community the opportunity to discuss in detail solutions and strategies for challenges outlined in the SWOTs. Following the Discussion Groups, the Strategic Steering Committee reviewed the information gathered, along with the information collected as a part of the SWOTs and adopted the following Guiding Principles for Sterling:

Sterling Montessori and Charter Academy Guiding Principles:

- 1.) Sterling Montessori will nurture in its students a life-long love of learning, and respect for themselves and others, in a “peaceful” 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.

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- 4.) Sterling Montessori will be a community where the voices of the students, parents and faculty are valued equally and all members of the community are welcomed to actively participate.
- 5.) Sterling will have a strong management team, led by the executive director, who will create sound procedures guided by established policies that 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.

Next Steps: Phase Three: Strategies and Goals

Using the Mission Statement and Guiding Principles as a framework, the LHU Foundation Board will work with parents, faculty and staff to assign goals and strategies for accomplishing those goals for each Guiding Principle that insure Sterling remains true to its mission and guiding principles.

Faculty workgroups will be established around each of the Guiding Principles and will work over the summer months and into the fall to present detailed goals and strategies. Timelines for accomplishment and budget requirements will also be developed. The final product will be a Comprehensive 5-year Strategic Plan for Sterling Montessori Academy and Charter School that will be presented to the Sterling community upon its completion.

Conclusion:

Lilly Skok Bunch is grateful to the Sterling community for its active participation in the strategic planning process and its honesty in speaking about the challenges it faces. Sterling is a community comprised of individuals who are here by choice, and their passion for this place is contagious.

The LHU Foundation's commitment to changing the course of action in a *planful* way is evident in their commitment to the Strategic Planning process and their recognition that planning must happen before decisions are made in regards to campus growth.