Summit 20/20 Year One Report

Progress on the Strategic Plan for Summit Montessori
Summit 20/20: Year One Report

Last year Summit Trustees, in collaboration with Head of School Martha Torrence and the administrative staff, introduced a five-year plan, Summit 20/20, that advances our School and positions Summit for continued improvement and growth. All school constituencies contributed their thoughts and ideas, and reviewed the early drafts. Trustees approved Summit 20/20 in the fall of 2015, with the understanding that a report to the community would occur annually.

Work on Summit 20/20 paralleled the faculty and staff’s focus on the accreditation self-studies for the Association of Independent Schools of New England and the American Montessori Society (AMS). The dual accreditations were completed in 2015; the Strategic Planning Committee included recommendations from the accreditation reports in the strategic plan. This report describes the progress on each of the four goals of Summit 20/20.
## Summit 20/20 Summary of Five-Year Strategic Plan

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<th>GOALS</th>
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| **Strengthen Summit’s Position as an Educational Exemplar** | **Continue to review and refine program** | • Implement program recommendations from AISNE & AMS accreditations  
• Expand scope and funding for professional development program  
• Conduct an in-depth review of one curriculum area each year |
| **Broadcast Summit’s strengths / achievements** | | • Enhance regional presence  
• Document and communicate successes of Summit graduates |
| **Achieve Optimal School Size and Structure** | **Achieve and sustain full enrollment** | • Increase funding and human resources for admission/retention efforts  
• Enhance parent education/participation  
• Refine measurement and communication of student outcomes |
| | **Implement plan for ideal school size and structure** | • Analyze enrollment in varying program structures and classroom configurations  
• Develop enrollment plan, including multi-year sequence of events and required actions  
• Develop staffing plan for each enrollment scenario |
| **Ensure Financial Sustainability** | **Increase net income** | • Develop 5-year financial model considering multiple scenarios  
• Maximize revenue by expanding programs |
| | **Increase giving** | • Increase community participation in the Summit Fund  
• Increase number of leadership donors  
• Prepare for capital campaign  
• Launch capital campaign |
| **Expand/Reconfigure Facilities** | **Determine optimal facilities configuration** | • Define facilities needs, including community space  
• Evaluate financial feasibility and capital requirements |
| | **Develop and implement facilities plan** | • Develop plan, including design and budget, for improvement and/or reconfiguration of facility  
• Reconfigure and/or construct redesigned space |
Goal 1: Strengthen Summit’s Position as an Educational Exemplar

This goal addresses the importance of continued program development that provides our students with an excellent education and enhances Summit’s reputation among independent and other schools in our region. Examples of progress toward this goal are as follows:

- The AISNE and AMS accreditations offer compelling evidence of Summit’s quality. These accreditations and subsequent recommendations form the basis for the on-going examination of program and practice.

- Curriculum task forces conduct annual program reviews: last year in technology, physical education and handwriting; this year in technology and science.

- The Board has increased funds available for professional development and anticipates continued and increased support in this area.

- Head of School Martha Torrence was recently elected president of the Montessori Schools of Massachusetts (MSM) Board of Directors. Martha’s position will enhance Summit’s reputation throughout the Commonwealth.

- The administration has increased efforts to follow the educational and professional experiences of Summit graduates. This initiative will be funded in the FY18 budget.
Goal 2: Achieve Optimal School Size and Structure

This goal addresses the question of Summit’s “ideal” size, as a whole school and at each educational level. It also focuses on optimal enrollment growth. It addresses the strengths and limits of our existing facility given the forty-five percent enrollment growth during the past four years. Examples of progress toward this goal are as follows:

- The School Size and Structure Task Force, which included administrators, faculty, and parents, met throughout the past year and drafted recommendations to be implemented beginning in Year Two of Summit 20/21.
- The Director of Admissions position was increased to full time, thereby expanding resources for student enrollment and retention.
- Strong leadership of the Summit Montessori Parent Association (SMPA) has improved parent involvement in school advocacy and strengthened participation in a broad range of community building activities.
- A variety of parent education sessions have drawn enthusiastic audiences. Parent attendance at school events and participation in annual giving continue to grow.
- Based on reactions from a parent survey and with the support of outside consultants, faculty revised student progress reports to more concisely convey student outcomes.

“Summit is a very unique school. Summit’s individualized curriculum encourages each kid to reach beyond his/her capabilities.” — A Summit Parent
Goal 3: Ensure Financial Sustainability

This goal investigates the level of enrollment and revenue that will best provide the resources necessary to successfully operate the School over the long-term. Examples of progress toward this goal are as follows:

- A Summit Trustee developed a model with a ten year timeframe that allows the Finance Committee to manipulate variables such as enrollment, tuition, staffing, renovation and/or new construction to determine long-term financial outcomes.

- Annual giving, which registered a significant increase during the first year of Summit 20/20, continues to be a priority for the Development Office. A second priority includes the growth in leadership donors. To that end, in FY17 the Board allocated funds to increase the hours of the part-time Development Director.

- During the strategic planning process all constituencies indicated a clear need for a community space/gym/theater. Additionally, projected growth in enrollment necessitates new classroom and playground spaces and increased parking. The Board is currently exploring the feasibility of a capital campaign to fund these improvements.

“I love it here!”
Goal 4: Expand/Reconfigure Facilities

Trustees and administration have just begun to address this goal. At their November retreat Trustees made the following action plan for the current fiscal year:

- Develop a maintenance plan for the Summit property at 303 Pleasant Street.
- Evaluate multiple means of expanding classroom space.
- Prepare and distribute a Request For a Proposal (RFP) for an expanded Summit campus.
In Closing

At the end of the first year of our strategic plan, *Summit N* continues to inform the priorities, choices, and risks that the School undertakes. Progress in this first year has been impressive, thanks to the leadership of Martha Torrence, the involvement of faculty and staff, the very active participation of Trustees, and the continued commitment and confidence of our parents. Together we will imagine, plan, and build Summit’s future for the benefit of our children and children in generations to come.
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