Dear Summit Friends,

At the outset of Summit Montessori’s twentieth year we stand at an important juncture with much to celebrate and much to anticipate. Having fully completed the ambitious, but short-term, goals of the School’s recent three-year Strategic Plan (see box to the right), including accreditation by the American Montessori Society and the Association of Independent Schools of New England, we now launch a new plan, Summit 20/20, that envisions Summit’s development and growth for its next five years. The plan will guide us in making key decisions and setting priorities as we steer the School beyond its foundational two decades and into a mature and sustainable future.

We are proud of our past and poised for the future. We encourage and enlist your vital support as we envision and realize this “small by design” school’s unfolding potential.

Martha Torrence  
Head of School

Geoffrey Pierson  
Chair of Strategic Planning Committee

President, Board of Trustees

Summit Montessori School is a community dedicated to developing respectful, self-motivated, life-long learners. Through a challenging, individualized, Montessori-based curriculum, children cultivate their strengths to reach their unique potential and to become active participants in the global community.

Outcomes of the 2012-2015 Strategic Plan

Program:
• Introduced the Beginners Program  
• Accredited by AISNE and AMS  
• Added programs, staff, and the Learning Support Team

Marketing and enrollment:
• Launched new website and promotional materials  
• Enhanced outreach and retention initiatives  
• Increased enrollment by 50%

Facilities:
• Reconfigured space for the Beginners Program  
• Completed a five-year plan for building and equipment renewal

Development:
• Increased the number of annual fund donors by 50%  
• Doubled the number of leadership donors
Our Vision

**Summit 20/20** will continue Summit’s development by further expanding its reputation as a leading Montessori independent school. Our graduates will continue to excel at an array of middle and secondary schools and universities, embodying Summit’s core values of **self-motivated learning**, **social responsibility**, **confidence**, and **proactive global citizenship** throughout their schooling years and beyond.

As part of our quest for continuous improvement, Summit will incorporate recommendations issued as part of the School’s dual accreditations earned in 2015. We will prepare for further enrollment growth, strengthen our financial position, and launch a capital campaign to support the renovation or expansion of facilities in order to accommodate our ambitious program.
Development of Summit 20/20

The Strategic Planning Committee of the Board of Trustees sought opinions and suggestions from parents, faculty and Trustees and compared results from these meetings with observations from year-end parent surveys, analyses of two self-studies prepared in connection with the accreditation process, and recommendations made by visiting teams in their accreditation reports. The Committee also examined enrollment projections, financial analyses, demographic data, and differing space configurations. Working from a compilation of this material, Trustees drafted goals in preparation for a day-long retreat, facilitated by Hussain Mooraj, Principal and Partner at Deloitte Consulting. The draft plan was reviewed by Trustees, faculty, parents, and other friends of the school. Their comments and suggestions have been incorporated into the completed plan, which was approved by the Board at its September 2015 meeting. Summit 20/20 is summarized on the following page with further detail in succeeding pages.
## Summit 20/20 Summary of Five-Year Strategic Plan

<table>
<thead>
<tr>
<th>GOALS</th>
<th>OBJECTIVES</th>
<th>INITIATIVES</th>
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<tbody>
<tr>
<td><strong>Strengthen Summit's Position as an Educational Exemplar</strong></td>
<td><strong>Continue to review and refine program</strong></td>
<td>• Implement program recommendations from AISNE &amp; AMS accreditations</td>
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<td>• Expand scope and funding for professional development program</td>
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<td>• Conduct an in-depth review of one curriculum area each year</td>
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<td><strong>Broadcast Summit’s strengths / achievements</strong></td>
<td>• Enhance regional presence</td>
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<td>• Document and communicate successes of Summit graduates</td>
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<td><strong>Achieve Optimal School Size and Structure</strong></td>
<td><strong>Achieve and sustain full enrollment</strong></td>
<td>• Increase funding and human resources for admission/retention efforts</td>
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<td>• Enhance parent education/participation</td>
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<td>• Refine measurement and communication of student outcomes</td>
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<td><strong>Implement plan for ideal school size and structure</strong></td>
<td>• Analyze enrollment in varying program structures and classroom configurations</td>
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<td></td>
<td>• Develop enrollment plan, including multi-year sequence of events and required actions</td>
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<td>• Develop staffing plan for each enrollment scenario</td>
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<td><strong>Ensure Financial Sustainability</strong></td>
<td><strong>Increase net income</strong></td>
<td>• Develop 5-year financial model considering multiple scenarios</td>
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<td>• Maximize revenue by expanding programs</td>
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<td><strong>Increase giving</strong></td>
<td>• Increase community participation in the Summit Fund</td>
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<td>• Increase number of leadership donors</td>
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<td>• Prepare for capital campaign</td>
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<tr>
<td></td>
<td></td>
<td>• Launch capital campaign</td>
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<td><strong>Expand/Reconfigure Facilities</strong></td>
<td><strong>Determine optimal facilities configuration</strong></td>
<td>• Define facilities needs, including community space</td>
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<td>• Evaluate financial feasibility and capital requirements</td>
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<td><strong>Develop and implement facilities plan</strong></td>
<td>• Develop plan, including design and budget, for improvement and/or reconfiguration of facility</td>
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<td>• Reconfigure and/or construct redesigned space</td>
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Throughout its twenty years Summit has dedicated itself
to excellence in Montessori education. The school’s 2015
accreditations from AMS and AISNE have positioned it not only to
continuously rededicate itself to educational excellence, but also to
step forward as an educational leader in the region and within the
broader Montessori community.

Summit will continue to maintain the highest standards of
Montessori practice by routinely and systematically examining
curriculum and pedagogy, and adapting innovations as deemed
essential. The school also dedicates itself to documenting and
publicly articulating both short and long-term student outcomes.

In order to inspire and support faculty and staff and to ensure the
School’s continuous pursuit of excellence, Summit will expand its
commitment to a comprehensive professional development plan.
GOAL: Achieve Optimal Size and Structure

Within Summit’s intimate environment our families are linked by a shared commitment to Summit’s innovative curriculum and individualized approach to nurturing all aspects of each child’s development. Though Summit is “small by design,” we will further ensure Summit’s financial sustainability and future development by increasing funding and human resources for sustaining retention and building enrollment.

We will conduct program and classroom analyses and develop action and staffing plans for various enrollment scenarios. These scenarios will not be limited by the current enrollment and building capacity, but rather will consider the size and structure of the School that best fits the forecast demand for enrollment and the School’s Mission.

Strong parent leadership through a reinvigorated Summit Montessori Parent Association is imperative for a cohesive school community. Additionally, parent education is an ongoing priority, as a deep understanding of Montessori philosophy and student outcomes helps our parents become more effective advocates for their children and for Summit.
GOAL: Ensure Financial Sustainability

Summit is committed to ensuring financial sustainability by thinking broadly and creatively about all aspects of our operating model. We will manage resources to optimize program structure and enrollment, increase participation in the annual fund, control costs, and identify opportunities for new revenue sources. To inform the Board and administration in making key strategic decisions, we will create a comprehensive five-year financial model, considering multiple scenarios. Continued growth in revenue and surpluses will further strengthen program quality and help position the school to implement facilities improvements and/or expansion.
Summit's enrollment continues to grow toward a capacity of 105 students in the current configuration of its facility. As Summit approaches capacity, the need for reconfigured and expanded spaces becomes increasingly critical.

While future enrollments and revenues cannot be precisely projected, preparing for growth is of strategic importance. Summit has engaged architectural services to develop alternative space configurations to provide for additional enrollment, community gatherings, recreation, and workspace. Realizing any of the alternatives will require increased revenue and capital fundraising. Within the period encompassing Summit 20/20, anticipated conditions will permit improvements in facilities to support expanded and enriched programs for the entire community.
We believe that Summit 20/20 provides a realistic and forward thinking framework for the development, funding, and evaluation of the school’s goals. Progress will be reviewed periodically, and an annual report will summarize each year’s accomplishments, as well as adjustments made to reflect changing conditions.

All of us—parents, faculty, trustees, alumni, and generous supporters—are associated with Summit because of its exemplary application of Montessori teaching and curriculum, its culture of high expectations and personal responsibility, and its commitment to each child’s achievement and well-being. Summit’s excellence has been confirmed through the recently completed accreditations from the American Montessori Society and the Association of Independent Schools of New England. This confirmation and affirmation will provide the Summit community with the additional confidence, momentum, and enthusiasm to support the successful achievement of Summit 20/20’s ambitious goals.
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