



Summit Montessori School
Strategic Plan 2021 - 2024

Our Mission Statement

Our Mission: 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.

Head of School Welcome



This year we proudly celebrate the first twenty-five years of Summit Montessori's existence. As we celebrate, we also envision the next phase of this wonderful "small by design" school's life. At this critical juncture, it is essential to take stock, create a vision of Summit's future, and outline plans to boldly live into that future. We do so through the mechanism of strategic planning.

Past strategic plans have powerfully forwarded the School's mission, values, and sustainability. For example, past plans led us to launch the Beginners program, achieve two important accreditations, increase the School's financial stability, and to emerge as a leader among Montessori independent schools.

Our next plan moves us forward toward enrollment growth and therefore further financial sustainability by broadening the Beginners and Children's House programs through the addition of new learning spaces. The plan embraces and powerfully forwards our goal to live into core Montessori values via our DEI (Diversity, Equity, and Inclusion) work. The plan forwards our position as a leader in the Montessori community, supports the growth and development of our faculty and staff, and promotes the importance of the Summit experience and related outcomes.

We invite your active participation as we launch and live into this new strategic plan. It is only with the support of an active and invested community that we can move forward and achieve our goals. Happy Birthday, Summit, and may the next twenty-five years build excitingly and productively from the first.

A handwritten signature in black ink that reads "Martha Torrence".

Martha Torrence

Head of School

Summit 20/20 Outcomes

Summit 20/20 detailed extensive objectives for our community in all areas from alumni relations to diversity and inclusion work. The Board, staff, faculty, parents, volunteers, and alumni of Summit worked to establish initiatives to accomplish the goals.

The accomplishments are summarized below:

- AISNE and AMS accreditations and implementation of recommendations
- Submitted 5-year accreditation report update to AISNE and AMS
- Instituted annual reviews of individual curriculum strands
- Expanded the professional development program
- Staff membership and participation in professional organizations
- Enhanced the organization of the educational and professional experiences of Summit graduates
- Increased the Director of Admissions position to full time
- Revised student progress reports to more concisely convey student outcomes
- Developed a financial model to determine long term financial outcomes
- Increased the hours of the part-time Development Director
- Developed a maintenance plan for the Summit property at 303 Pleasant Street
- Upgraded and consolidated record-keeping and assessment systems
- Expanded summer programs
- Engaged an architect to develop a master plan for the Summit Campus
- Launched a Diversity, Equity, and Inclusion initiative

Our Process for Summit 2021 - 2024

In the fall of 2020, the Board of Summit Montessori School formed a Strategic Planning task force to:

- 1) review the goals and outcomes of Summit 20/20
- 2) discern new goals and objectives for the next strategic plan period
- 3) develop a roadmap to communicate and implement the new plan.

The task force consisted of current board members as well as one trustee emeritus who had coordinated the Summit 20/20 plan. The group revised existing documents to display progress, remove completed goals, and introduce new objectives. We agreed to maintain the structure used in Summit 20/20 (defining the foundational pillars, describing our objectives within each pillar, then detailing initiatives that enable us to meet our objectives) for clarity and consistency. Revisions of the plan were presented to the board as a whole and to individual board committees for feedback, wording, and input.

This work reinforced what many of us already knew, that Summit's main goals are interconnected, which may be typical of an organization of our size and age. We recognized that this round of goals was of shorter duration and we have changed the term accordingly. Throughout our work, two goals seemed to dominate our discussions: **enrollment** and **diversity**.

Enrollment is the driving factor in sustaining our community and its unique offering. The surrounding communities from which we draw families have a need for quality, flexible preschool and elementary programs. By extending our facilities, we grow this important layer of our student and family population. By extending our calendar to include year-round programming for Beginners, we fill an important need for families. Most importantly, Summit must strive to sustain the enrollment goals in its Children's House and Elementary programs. A large, thriving Beginners population will help to ensure this stability.

Our community benefits from the **diversity** of its members. Through our past deliberate efforts, we have created a community that includes people of a variety of races, ethnicities, first languages, socioeconomic classes, disabilities, and gender identities. To ensure this work continues into the future, it will be our job to define and prioritize our objectives and commit to the work at all levels at Summit (students, parents, administration, teachers, and board members). These are not low expectations! Our goals are both exciting and challenging and will require commitment, energy, and participation on all our parts. We are poised for a period of great growth for Summit and appreciate you being with us!

Summit 2021 - 2024

GOALS	OBJECTIVES	INITIATIVES	YEAR 1 2 3
Maintain Summit's Position as an Educational Exemplar	Promote the importance of the Summit experience and outcomes.	<ul style="list-style-type: none">• Describe the advantages of the complete Summit experience by enrolling in Beginners and remaining through the sixth grade culminating experience.• Regularly articulate "Small by Design"; its intention and value.• Create a mechanism for capturing data from new, accepted (but not attending), and accepted families regarding how and if our facilities influenced their decision.• Evaluate whether more should be done to retain and enhance Summit's sense of community as the threat of COVID diminishes.• Strengthen the alumni connection	
	Ensure the strong and consistent leadership from the Head of School, administrative team, and the Board.	<ul style="list-style-type: none">• Provide opportunities to adjust to new understandings and demands.• Emphasize an informed and engaging application of Montessori pedagogy and curriculum.• Promote faculty professional development and parent education.	
	Create and implement a plan for the "exmission" process for graduating 6th grade students	<ul style="list-style-type: none">• Analyze the experience of students as they matriculate to new schools.• Develop transition plan, including specific grade level processes and post-graduation follow-up• Develop staffing plan for each process• Formalize the data collected and publish results	
	Strengthen the alumni connection	<ul style="list-style-type: none">• Have alumni speak with the Board and faculty• Consider having alumni speak with prospective parents• Provide opportunities for alumni and current families to discuss the advantages of a Summit education.• Share alumni experiences beyond Summit for both community building and assessment of continuity	

Summit 2021 - 2024

GOALS	OBJECTIVES	INITIATIVES	YEAR 1 2 3
<p>Articulate Summit's commitment to Diversity, Equity, and Inclusion (DEI) work.</p>	<p>Communicate Summit's commitment to DEI</p>	<ul style="list-style-type: none"> • Craft a DEI mission statement 	
	<p>Develop a plan that defines and prioritizes the specific DEI objectives.</p>	<ul style="list-style-type: none"> • Execute the AIM survey regularly every 3 years. • Use AIM survey results to develop measurable goals. Engage experts as needed. • Establish policies and funding, specifically around recruitment and hiring. • Determine the financial and human resources needed to implement the plan • Publish a plan to the Summit Community 	
	<p>DEI Integration</p>	<ul style="list-style-type: none"> • Include our DEI perspectives in all areas of work (faculty, administrative, board). 	
	<p>Promote and commit to DEI work at the Board level</p>	<ul style="list-style-type: none"> • Seek new trustees to reflect the desired diversity of Summit. • Conduct trustee education to support DEI work 	
<p>Expand/Reconfigure Facilities</p>	<p>Execute the phases of the building plan (See Facilities at summit on following page)</p>	<ul style="list-style-type: none"> • Form a Risk/Benefit Committee • Secure funds for Phase I • Determine amount needed for Phase II • Preserve and enhance outdoor spaces • Secure funding for Phase II 	

Summit 2021 – 2024

GOALS	OBJECTIVES	INITIATIVES	YEAR 1 2 3
Consistently achieve Fully Budgeted Enrollment	Employ the appropriate staffing to support full enrollment	<ul style="list-style-type: none"> Sustain funding and human resources for admission/retention efforts 	
	Enhance parent education/participation	<ul style="list-style-type: none"> Resume focus on parent education/participation 	
	Execute the current building plan *see Expand/Reconfigure Facilities	<ul style="list-style-type: none"> See Expand/Reconfigure Facilities 	
	Consider the development of an adolescent program in the future	<ul style="list-style-type: none"> Refine measurement and communication of student outcomes 	
Ensure Financial Sustainability	Develop a strategic marketing plan	<ul style="list-style-type: none"> Engage a marketing professional to expand our impact area and explore possible grants which support our educational vision. Actively seek corporate and community relationships to support advancement, marketing, and enrollment efforts. 	
	Capital Campaign	<ul style="list-style-type: none"> Define, communicate and organize a Capital Campaign for Phases I and II of facility plans. 	
	Fund endowment	<ul style="list-style-type: none"> Offer endowment opportunities 	
	Continue to fund DEI work	<ul style="list-style-type: none"> Ensure operating budget supports DEI work 	

Diversity at Summit

At Summit Montessori School we believe in establishing a community where children cultivate their strengths to reach their unique potential and to become active participants in the global community. Summit's focus on Diversity, Equity, and Inclusion (DEI) furthers our commitment to maintaining a learning environment where each person is treated with dignity and respect, and where we all can thrive and build a community that supports one another and deliberately celebrates diverse backgrounds, histories, perspectives, identities, cultures, religions, and races.

Our focus on Diversity, Equity, and Inclusion emerges from core Montessori principles. This work is essential at Summit because it highlights our commitment to developing respectful, self-motivated, life-long learners who value diverse perspectives and celebrate differences. We approach this work with humility, respect, and a bias towards inclusiveness. Our goal is to leave a lasting impression on our community. Our DEI work is an important way to make our values tangible and explicit.

Facilities at Summit, Phase I and II

As a result of work that the Board began in 2016 to answer important questions regarding the long term strategic goals of the school, it was clear that in order to ensure the school is financially sustainable for the long run, it is essential that we expand certain programs and modestly increase our enrollment. It was also clear that the school would greatly benefit from a larger community space where the children and the larger Summit community can gather. After much discussion and modeling of various scenarios, a series of recommendations were made by the Board for a 2-phase facilities expansion. Phase 1 will expand our Beginners Program through the addition of a 2nd classroom as well as the addition of year-round programming. This capital project will renovate an adjacent school-owned property at 303 Pleasant Street. A team of Martha, staff, several Board members, and a local architect has been working to accommodate 2 Beginners classrooms and an indoor play and community space, ensuring it has the Summit "look and feel" we value and embraces the Montessori classroom design. We are making great progress and expect to break ground on the renovation in early 2022. Phase 1 also includes some exciting changes to our outdoor play spaces and the parking lot. In the years following the completion of Phase 1, we will undertake Phase II of the capital project, which will include a gym and a larger community space.

Summit's Board of Trustees

The Zoom format of 2020!



2020-2021 Board of Trustees

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Alex Stephen
Martha Torrence (ex-officio)

Trustees Emeritus

Thom Greenlaw
Michelle Marino
Kingsley (Chip) Norris
Geoffrey Pierson

~Summit Alumni
*Current Parent
^ Alumni Parent

A list of current board members can be found at:
www.summitmontessori.org/our-community/board-trustees

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