

# CASTLE ISLAND BILINGUAL MONTESSORI

INNOVATIVE. INTERCULTURAL. INCLUSIVE.

- A JOYFUL LEARNING COMMUNITY SINCE 2012 -

English & Spanish Immersion | Independent Elementary School | Excellence in Education for Children Ages 3 - 13

## Strategic Plan 2024

Submitted  
By  
Board of Trustees  
January 2024

## GOALS 2023 Update

### 1. Invigorate Interest in BoT Membership

**Objective A: Implement an Annual Documents and Policies Review**

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**Objective B\*: Look to new ways to invigorate interest in BoT membership and that it prepare a strategic succession plan for future board leadership.** - -----

### 2. Institutional Development to Meet Mission & Revisit Vision

**Objective A: Accreditation Celebration & Presentation of New Vision 2032 – Spring 2023**

**Objective B: Outdoor Classroom – Phase 1 \$6800 net raised of our \$6800 matching grant; Phase 2 budget and financing**

**Objective C: Growth and Expansion: 8th Grade, Augmented Admin Team, Facilities temporary, transitional, and permanent**

### 3. Creation of a Five-Year Financial Model

**Objective A: Establish benchmarks of anticipated outcomes and competencies for each level so that teachers and parents will be clear about outcome expectations from the EC, LE, and UE programs**

4. Provide Necessary Human Resources & Increase Salaries to Support Longevity

**Objective A: Director Evaluation**

**Objective B: Implement Salary Structure with Budgeted 5-Year Increases**

**Objective C: Develop & Implement Salary Perks - Detailed addendum included with annual contract**

5. Learning Outcomes Benchmarks for Each Level

**Objective A\*: Creation of a 3-5 year financial model that includes scenarios for low, medium, and high rates of enrollment including space capacity analysis for each enrollment scenario. The ability to provide necessary human resources for the school's operations depends on this strategic financial modeling information.**

**Objective B: Tuition increase for 2023-4 and Tuition Increase Structure to be implemented 2024-5**

**Objective C: Continue to explore financial avenues to bring teacher and admin salaries to the level that will support longevity of employment for this talented team.**

**Objective D: 10<sup>th</sup> Anniversary Campaign Wrap-Up – Monthly Meetings of Fundraising Committee**

\*AMS recommendation

# GOALS 2024

The following five goals are aligned with the American Montessori Society (AMS) Standards for School Improvement. Every goal also falls under the umbrella of Standard 1: Student-Centered and guided by the Montessori philosophy, mission and vision:

## AMS Standard 1: Philosophy, Mission, and Vision

The quality Montessori school's mission and vision are student-centered and guided by Montessori philosophy. The school establishes and communicates a shared philosophy that informs all facets of the school's culture, daily operations, and instructional decisions

## Goals

1. Invigorate BoT Membership & Structure
2. Institutional Development to Meet Mission
3. Creation of a Five-Year Financial Model
4. Provide Necessary Human Resources & Increase Salaries to Support Longevity
5. Learning Outcomes Benchmarks for Each Level

# GOAL 1 Invigorate BoT Membership & Structure

## Standard 2: Governance, Leadership, and Continuous Improvement (Strategic Plan)

The quality Montessori school promotes student learning and school effectiveness through strong governance and leadership that are aligned with the school's mission and vision. It establishes, implements, monitors, and refines a strategic planning process to demonstrate continuous improvement.

and

## Standard 8: Records, Resources, and Support Systems

The quality Montessori school has appropriate documentation, training, and human resources to meet applicable federal, state, and local regulations, assure health and safety of faculty/staff and students, and enable all students to achieve expectations for student learning.

### A. Implement an Annual Review Documents and Policies

- o Board of Trustees Bylaws
- o Staff Handbook
  - Job Descriptions
  - New & Revised Policies
- o Family Handbook
  - Tuition Policy
  - New & Revised Policies
- o The Website
  - Curriculum
  - Tuition Investment

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Executive Committee, plus Yvette**

Financial implications:

**Legal review fees, if needed**

### B. Look to new ways to invigorate interest in BoT membership and prepare a strategic succession plan for future board leadership.

**\*AMS recommendation\***

- o Attracting potential BoT candidates on vision/name recognition
- o Creation of succession term "guidelines" or limits of officers, as well as implement a term rotation to mentor and train incoming officers

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Diversity/Accreditation/Membership Committee**

Financial implications:

**Directors & Officers Insurance Fees**

# GOAL 2 Institutional Development to Meet Mission

## AMS Standard 3: Teaching and Learning (Educational Nature)

A quality Montessori school implements a Montessori curriculum based on clear and measurable learner outcomes. Students actively engage in the learning process, exhibit joy in learning, and apply their knowledge and skills to real-world situations.

and

## AMS Standard 6: Facility Resources

The quality Montessori school provides facilities, sites, and equipment that meet optimum health and safety standards conducive to a safe learning environment in alignment with the mission of the school.

and

## AMS Standard 9: Stakeholder Communication and Relationships

The quality Montessori school fosters effective communications and relationships with and among its stakeholders.

### A. Outdoor Classroom – Phase 1 \$6800 net raised of our \$6800 matching grant; Phase 2 budget and financing

- o Source materials, furniture, beds, etc
  - Work Day for installation
- o Fundraiser for garden materials, converting asphalt, etc
  - Restaurant fundraiser i.e. Blaze, Bare, etc.
  - Use our existing resources for activity series
    - i.e. community led “wellness workshops”
      - o Keara - adult health; Jen - pet health; Diane - Spanish led resources for children’s health, music for health, etc

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Finance, Facilities, and Fundraising Committee**

Financial implications:

**Estimates (on file)**

**B. Growth and Expansion: 8th Grade, Augmented Admin Team, Facilities temporary, transitional, and permanent**

1.

- o Hire a new Communications/Outreach/Grant Coordinator
- o Hire Upper Elementary & Adolescent Teachers
- o Submit petition to NYSED Board of Regents for Absolute Charter, with possible charter amendment **by February 2025**

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Diversity, Accreditation, Board Membership Committee**

2.

- o Marketing investment for Enrollment, Donors & Hiring
- o Facilities: 2 year goal – upgrades, 5 year goal – stay or move? Add'l space - 52 James St 10 year plan for more classrooms to enable enrollment growth

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Finance, Facilities, and Fundraising Committee**

Financial implications:

**Based on income from enrollment growth and possible external funding sources from grants; expenses related to expansion (overhead, furniture, supplies)**

# GOAL 3 Learning Outcomes Benchmarks by Level

## AMS Standard 4: Documenting and Using Results (Learner Outcomes)

The quality Montessori school enacts an ongoing assessment system that monitors and documents learner outcomes and uses these results to improve educational effectiveness.

**A. Establish benchmarks of anticipated outcomes and competencies for each level so that teachers and parents will be clear about outcome expectations from the EC, LE, and UE programs \*AMS recommendation\***

- o Criteria to include: AMS/NAIS & NYSAIS/NYSED Common Core & Next Gen/Spanish
- o Draw from sample Assessments from other schools & NCMPS (National Center for Montessori in the Public Sector)

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Diversity/Accreditation/Membership Committee**

Financial implications:

**Budget & Funding for Staff to be Paid for Work**

# GOAL 4 Provide Necessary Human Resources & Increase Salaries to Support Longevity

## AMS Standard 5: Personnel

The quality Montessori school has policies and practices in place to ensure that employees are well qualified and are assigned professional responsibilities based on their qualifications (i.e., professional preparation, ability, knowledge, and experience). Employees are provided support through ongoing evaluation and professional development and are sufficient in number to support the school's mission and vision. The school states and follows fair, ethical, and non-discriminatory employment practices.

### A. Director Evaluation

- Assign to committee
- Find way to survey staff w/o trepidation i.e. comment box, no typed, anonymous location
- Formalize process and put in document

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Executive Committee**

Financial implications:

**None**

### B. Develop & Implement Salary Perks - Detailed addendum included with annual contract

- Sponsored Lunches
- Complimentary Professional Development Books
- Access to Redburn Amenities
- Other \_\_\_\_\_

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Executive Committee**

Financial implications:

**Donation Based**

### C. Explore possibilities for Health Insurance and Investments

- Capital Region Chamber of Commerce Membership
- 401k & Life Insurance (Jose Segura)

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Executive Committee**

Financial implications:

**Based on Budget Development**

# GOAL 5 - Creation of a Five-Year Financial Model

## AMS Standard 7: Finances and Stability

The quality Montessori school maintains strong and prudent financial management practices and adequate fiscal resources to support its mission and vision.

- A. Creation of a 3-5 year financial model that includes scenarios for low, medium, and high rates of enrollment including space capacity analysis for each enrollment scenario. The ability to provide necessary human resources for the school's operations depends on this strategic financial modeling information.**

**\*AMS recommendation\***

- o 5 year budget plan (implement)
  - Low – review tuition/sliding scale.
  - Medium – marketing to achieve, grants (hire pro).
  - High – expansion, grants (hire pro)

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Finance, Facilities, and Fundraising Committee**

Financial implications:

**Based on Budget Development**

- B. Tuition Increase Structure Review:**

- o Review/revision of sliding scale amounts including income cap
  - Review current distribution along scale
  - Review cap/floor (\$125k/\$4.5k presently)
- o Consider additional tuition increase
- o Develop multi-year structure

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Finance, Facilities, and Fundraising Committee, including Sara**

Financial implications:

**Based on Budget Development**

**C. Continue to explore financial avenues to bring teacher and admin salaries to the level that will support longevity of employment for this talented team.**

- o Obtain grant funding and donated contributions
- o Raise tuition

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Finance, Facilities, and Fundraising Committee, including Sara**

Financial implications:

**Based on Budget Development**

**D. Raise More Funds through Annual Events & Campaigns**

- o Events: Fall Fiesta, Founders' Day Dinner, *Feria de Español*, Walk-a-Thon, etc
- o Campaigns: End-of-Year/Giving Tuesday
  - "5 Points of Contact"
    - Strategic Plan Report
    - June Report Card (accomplishments)
    - September Back-to-School (new purchases/additions)
    - End-of-Year/Giving Tuesday (Holiday letter)
    - Thank you letter/IRS Receipt
- o Outdoor Classroom sponsors & dedication

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

**Finance, Facilities, and Fundraising Committee, including Sara**

Financial implications:

**Fundraiser, including contributions from Sponsors**

# Addendum

Castle Island Mission *Approved by the New York State Education Department (NYSED) as a nonprofit independent elementary school, 2012*

Castle Island provides world-class and accessible education fully immersed in English and Spanish in a fully implemented Montessori learning environment for children of the Capital Region of New York.

Vision 2012-2022 *Adopted by the Castle Island Board of Trustees, 2012*

We inspire learning by honoring each child's potential in a world-class learning environment designed to foster curiosity, collaboration, and innovation. Immersion in a bilingual, diverse Montessori school will offer our students the unique challenges and opportunities to become creators of solutions and leaders of a technologically advanced, environmentally vital, peaceful global community.

## AMS Accreditation Site Visit Report

*Submitted by the Visiting Team, April 2022*

### Major Commendations

The AMS Accreditation On-site Visiting Team commends the school for . . .

- The very thorough preparation of its self-study, in which broad participation from the community was invited and welcomed.
- Its decision to deliberately locate in a region of the city that is accessible to a broad and diverse community and that is also developing and growing, thereby making possible the mission-related growth of the school.
- Its deep dedication to the implementation of its mission. The mission is expressed in all aspects of school and classroom life and visibly embraced by all staff.
- Implementing its mission as a bilingual (Spanish-English) immersion model of Montessori education with a high level of integrity.
- Implementing Montessori-style leadership in which the staff is empowered to participate in decision making.
- Its leadership team in developing a coherent strategic plan designed to move the school forward, and for outlining specific steps to achieve that plan.
- The aggressive accomplishment of two of its major strategic goals, those of completion and submission of its accreditation self-study and relocation to a new and more mission-supportive location.
- Its decision to deliberately locate in a region of the city that is accessible to a broad and diverse community and that is also developing and growing, thereby making possible the mission-related growth of the school.

- Undertaking a mid-school year move into new quarters and preparing beautiful and orderly learning environments for the children within a few weeks' time, particularly the classroom teachers
- Creating and implementing a sliding scale tuition plan, thereby helping to ensure the inclusion of a range of families from various socio-economic backgrounds.
- Developing a thorough Resource Directory documenting professional support services beyond the school for families that may need them.

### Major Recommendations

The AMS Accreditation On-site Visiting Team recommends that the school . . .

- Follow through immediately with its plans to provide leadership of the elementary classroom by a fully credentialed Montessori teacher.
- Engage in the creation of a 3–5-year financial model that includes scenarios for low, medium, and high rates of enrollment including space capacity analysis for each enrollment scenario. The ability to provide necessary human resources for the school's operations depends on this strategic financial modeling information.
- Continue to explore financial avenues to bring teacher and administrative salaries to the level that will support longevity of employment for this talented team.
- and its Board of Trustees look to new ways to invigorate interest in BoT membership and that it prepare a strategic succession plan for future board leadership.
- Establish benchmarks of anticipated outcomes and competencies for each level so that teachers and parents will be clear about outcomes expectations from the Early Childhood, Lower Elementary, and Upper Elementary programs.

# AMS Code of Ethics

*Adopted by the American Montessori Society Board of Directors January 2022*

## **Principle I: Commitment to Students & Their Families**

- Share resources for protecting equitable access to all programs and services, regardless of each student's and family's race, color, culture, sex, sexual orientation, gender identity, religion, disability, age, genetic information, veteran status, ancestry, national or ethnic origins, or any other classification protected by applicable law.
- Support practices that protect the physical health and psychological safety of each student and family.
- Encourage independent action in the pursuit of learning, community building, and social action.
- Honor professional commitments, and maintain obligations and contracts while neither soliciting nor involving students or their families in schemes for commercial gain.
- Keep in confidence information that has been secured in the course of professional unless disclosure serves professional purposes or is required by law.

## **Principle II: Commitment to Staff & Colleagues**

- Protect equitable access to AMS employment, programs, services, and other opportunities regardless of each individual's race, color, culture, sex, sexual orientation, gender identity, religion, disability, age, genetic information, veteran status, ancestry, national or ethnic origins, or any other classification protected by applicable law.
- Dedicate ourselves to recognizing, addressing, and eradicating all forms of racism and systemic oppression within our organization and programs.
- Represent one's own professional qualifications with clarity and true intent.
- Accept, offer, recommend, and assign professional positions and responsibilities on the basis of professional preparation and legal qualifications.
- Use honest, equitable, and effective methods of administering duties and conducting business.

## **Principle III: Commitment to the Montessori Movement**

- Uphold and publicly support the greater vision of Dr. Maria Montessori through such initiatives as the development and promulgation of standards for affiliation of teacher education programs and accreditation of schools, the providing of professional development opportunities, and support of Montessori research and advocacy.
- Ensure that our work honors the core components of Montessori education: properly trained Montessori teachers, multi-age classrooms, the uninterrupted work period, the prepared environment, and child-directed work.
- Share perspectives consistent with all of the items set forth in the principles above, when engaged in public discussion.
- Distinguish private views from the official position of the American Montessori Society when engaged in public discussion.