



COASTAL EMPIRE MONTESSORI COMMUNITY ORGANIZATION

301 Buckhalter Road
Savannah, Georgia 31405

CEMCO Strategic Plan 2017 – 2020

Adopted by the CEMCO Governing Board: May 2017

Facilitated by:



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II. COASTAL EMPIRE MONTESSORI COMMUNITY ORGANIZATION

Mission, Vision, and Key Elements

Mission

The mission of Coastal Empire Montessori Community Organization is to operate a public charter school that provides individualized elementary education rooted in Montessori philosophy emphasizing emotional, intellectual, physical, and social development in a nurturing and rigorous academic environment.

Vision

To cultivate a diverse, inclusive Montessori learning community rooted in awareness of and respect for self, others, and the environment so that teachers foster intellectual curiosity, students develop cognitive flexibility, and all stakeholders grow together as responsible compassionate stewards of the community.

Design

CEMCO serves Kindergarten through 5th Grade and implements a Montessori instructional model in which children complete individualized work plans and utilize tactile learning materials in a nurturing environment. The Montessori model emphasizes personal responsibility, care for the environment, and peaceful resolution of conflict. The Montessori Curriculum has been aligned with the Georgia Performance Standards to ensure that students simultaneously master the Montessori lessons and the grade-specific state standards.

Curriculum

CEMCO will follow the Georgia Standards of Excellence (GSE) and the Georgia Performance Standards (GPS) as applicable as its curricular framework.

Core Values

CEMCO upholds the following core values of Montessori Education: Peace, Respect, Open-mindedness, Independence, and Freedom with responsibility. Upholding these core values allows full participation in the educational program and ensures that CEMCO accomplishes its mission and realizes its vision.

Positive Discipline

All CEMCO faculty and staff are trained to use positive, prosocial discipline instead of punitive methods. These techniques are designed to teach mutual respect and understanding. To ensure consistency, teachers utilize a rubric to track behavior incidents and student responses, including improvements in behavior.

Parent Involvement

One of the keys to a great school is family involvement. Unlike many public schools, CEMCO is a school of choice. Families are requested to contribute 20-40 hours of service to the school each academic year. Through the Parent-Teacher Organization (PTO), fundraisers, and volunteering in the classroom, parents have numerous opportunities to engage with and contribute financially to the school.

Progressive Community Values

Diversity is embraced at CEMCO to create a welcoming and affirming environment for families of all types and backgrounds. Through cultural studies and local community projects, CEMCO's students develop core values to become responsible and compassionate stewards of the community.

After-School Enrichment Programs

CEMCO offers after school programs that are designed to complement and enrich student experiences in areas such as arts, dance and sports.

History of CEMCO

A non-profit corporation, the Coastal Empire Montessori Community Organization (CEMCO) was organized by seven Savannah-area residents in 2005 to operate the Coastal Empire Montessori Charter School (CEMCS). The goal is to provide the opportunity for Chatham County schoolchildren to experience educational services based on the teaching philosophy and methodology developed by Dr. Maria Montessori. CEMCS was set up in accordance with the Charter Schools Act of 1998 as part of an agreement between the Savannah-Chatham County Public School System's Board of Public Education, the State of Georgia's Board of Education, and CEMCO. The school began operation in August 2008 in facilities located at 301 Buckhalter Road in Savannah, Chatham County, Georgia.

CEMCS is innovative as compared to traditional schools in that instruction is individualized, work periods are uninterrupted and delineated by student choice within limits, and students work at their own pace to master their lessons. The CEMCS Montessori Curriculum is aligned with the Georgia Standards of Excellence and the Georgia Performance Standards so that student progress can be easily tracked through state-mandated testing. Teachers are both certified and Montessori-trained to facilitate students' progress through a rigorous, content-rich, hands-on curriculum via stimulating teaching in a safe and nurturing atmosphere.

The CEMCO community is unified, cohesive, and dedicated to realizing increases in student achievement through innovative approaches to individualized student education.

CEMCO Strategic Planning

A. Overview and Purpose

During the 2016-2017 school year, CEMCO'S governing board agreed to develop a three-year strategic plan in anticipation of filing its charter renewal petition. The strategic planning process formally began in September 2015, and the Georgia Charter Schools Association (GCSA) was engaged in December 2016 to facilitate final stages of the process. The strategic planning process was designed to comply with the State Board of Education (SBOE) Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards, adopted in November 2014.

Some of the key strategic-level issues that needed to be addressed through this process were: program growth, physical space, implementation of the academic program, board development, resource development, family and staff recruitment and retention, diversity, and fiscal health.

The strategic plan is meant to guide decision-making and implementation throughout the remainder of the current charter term, and is also intended to guide the planning for charter renewal, which will be submitted to the State in September 2017.

B. The Planning Team

A team of stakeholders engaged in the strategic planning process to ensure long-term viability of the organization and renewal of the charter contract. This team included members of CEMCO's governing board, school-based leadership team, and Parent Teacher Organization (PTO) leadership. The efforts of the strategic planning team and survey participants were valued and appreciated, and consisted of the following members:

Elizabeth Berenguer	Michelle Candline
Stephanie Babcock-Wright	Teresa Middleton
Teri Cornelius	Justin Hummel
Tim Blackston	Spencer Burch

Lisa Owens	Liliana Hudescu
Katiana Plummer	Meredith Shriver
Marty Colvin	Jennifer Williams
Eric Stiles	Katherine Davis

C. Methodology

On September 16, 2015, then-President of the Board, Liliana Hudescu, organized an ad hoc strategic planning committee to discuss SWOT analysis and set a course for moving forward with a strategic plan. The committee consisted of Stephanie Babcock-Wright, Elizabeth Berenguer, Michelle Candline, Kevin Laurent, and Teresa Middleton. The committee planned a SWOT analysis session held on February 2, 2016, and facilitated by Kellyn McGee. The purpose of this session was to identify the strengths, weaknesses, opportunities, and threats related to CEMCO. A broad cross-section of stakeholders including parents, trustees, and school leaders were divided into groups, and each group conducted a SWOT analysis of a discrete area of the school. Working in groups, each group consisting of trustees, members of the school’s leadership team, and parents and community members, the SWOT analysis was conducted to identify the following:

- The organization’s primary programmatic, operational, and administrative strengths and weaknesses.
- What opportunities exist to further the school’s mission and ensure that all charter goals are attained.
- What threats may impede attainment of goals.
- Any internal forces working for or against the organization achieving its stated mission.

The results from that session are below.

Internal Strengths	Internal Weaknesses
<ul style="list-style-type: none"> • Only Montessori charter school in state • Own nine acres of land • Stakeholders have a voice • Targeted professional development • Highly motivated staff/parents • Supportive board with diverse expertise • Innovative Montessori curriculum • Committed and adaptable administration • Continued leadership year-to-year • Staff accountability • Administration accepts teacher input • School recruits strong, talented teachers • Parental involvement • High demand for school (lottery) • Building financial annual reserves 	<ul style="list-style-type: none"> • Consistent communication • Logistics and financial management • Financial management <ul style="list-style-type: none"> ○ Staffing model ○ Process/policies ○ Business office organization • Facilities <ul style="list-style-type: none"> ○ Need renderings of desired pod-style campus ○ Traffic regulation ○ Facilitates Montessori learning environment ○ Soil and drainage issues ○ No public utility access ○ Playground • Confusion on fundraising roles and goals • Desire to add middle school would require accommodating middle school sports programs • Future transportation

Internal Opportunities	Internal Threats
<ul style="list-style-type: none"> • Parent training on Montessori curriculum • Building relationships with corporate sponsors • Seeking grants • Regular events to engage community • Community Garden • Leadership/governing board development • Construction of Solar Power field • Capital campaign for new facility • Purposeful PTO meetings • Fundraising Activities 	<ul style="list-style-type: none"> • No dedicated grant writer/administrator • Charter renewal • Funding gaps • Facilities costs (geographical challenge) • Limited physical space • Teacher compensation • Weak Business Plan • Limited parent participation

Through this foundational work, the stakeholders analyzed internal and external factors likely to affect the school, and the Board collected valuable inputs from stakeholders that influenced the outcome of the strategic planning session held in December 2016.

Between the SWOT and Strategic Planning Sessions, the following steps were taken:

- Conduct visioning exercise
- Create an environmental scan of members' collective knowledge
- Update vision
- Update mission
- Identify strategic initiatives
- Develop goals
- Approve strategic plan formally at a regular board meeting
- Monitor plan on a monthly

D. Strategic Planning Session

On December 19, 2016, Elisa Falco of GCSA facilitated a strategic planning session. The purpose of this session was to complete the following tasks:

- Determine long-term viability of growing to include middle school grades
- Determine long-term viability of continuing to operate preschool
- Work collaboratively to develop goals, timelines, and assign responsibility
- Develop measures to determine goal attainment

At the conclusion of the strategic planning session, the CEMCO Board determined the best course of action would be to phase out the preschool over the course of a year to teach out the current Pre-K3 students until they reach kindergarten. The Board also determined that it was not feasible at this stage to expand through eighth grade.

E. Visioning and Mission Session

During the course of creating the strategic plan, it became apparent that the mission and vision needed to be updated. As a result, the Board of Trustees scheduled a visioning and mission session on January 27, 2017, to analyze the existing vision and mission and refine it to more accurately represent CEMCO. The revised mission and vision statements were finalized on February 24, 2017.

F. Draft Review Period

The strategic planning team had the opportunity to review the strategic plan during April and May 2017 and provide substantive feedback on tone, content, and formatting of the plan.

G. Environmental Scan

The governing board and leadership were asked to imagine CEMCO in ten years. The following are key descriptive elements that resulted from the visioning exercise:

Holistic education	Innovative	Life skills
Worldly	Community	Respect
Environment	Compassion	Responsibility
Citizenship	Pride	Respect
Courtesy	Benevolence	More than a score
Maturity	Problem-solving	History
Culture	Integrated	Intellectual curiosity
Self-management	Self-regulation	Taking ownership
Specialized teachers	Environment	Natural consequences
Work plan completion	Emotional Intelligence	

The following collective vision statement resulted from the visioning exercise:

To cultivate a diverse, inclusive Montessori learning community rooted in awareness of and respect for self, others, and the environment so that teachers foster intellectual curiosity, students develop cognitive flexibility, and all stakeholders grow together as responsible compassionate stewards of the community.

The following collective mission statement was drafted after the vision was refined:

The mission of Coastal Empire Montessori Community Organization is to operate a public charter school that provides individualized elementary education rooted in Montessori philosophy emphasizing emotional, intellectual, physical, and social development in a nurturing and rigorous academic environment.

III. CEMCO STRATEGIC PLAN STRATEGIC INITIATIVES

Overview Initiatives

- Organizational Strength
 - Staffing model/organizational model
 - Staff retention
 - Leadership
- Facility Improvement
 - Determine needs based on school size/programming
 - Permanent facility
- Financial Sustainability
 - Resource development/marketing
 - School size
 - Budget-funding formula implementation

The task of drafting specific SMART goals for the initiatives was delegated to each standing committee.

Detailed Goals, Measures, Action Steps

- Organizational Strength Initiative (staffing model/organizational model):
 - During the 2016-2017 academic year, HR will review and update the job descriptions of all CEMCO staff.
 - February 2017: Reviewed and Ratified Head of Montessori Curriculum job description.
 - February 2017: Reviewed Business Manager job description and decided to wait until CFO hired to make any major changes.
 - February 2017: Created CFO job description.
 - By March 2017, HR will review the current organizational structure and redefine roles and job descriptions as necessary to make room for a CFO in the business office.
 - HR has reviewed the organizational structure and consulted with GCSA. For our size, we have been advised to staff the business office with one part-time CFO and one full-time business manager. Duties that must be segregated can be covered by other administrative personnel.
- Organizational Strength Initiative (leadership and staff retention):
 - HR will create a Campus Development Plan to encourage professional development amongst faculty and staff and familiarize potential school leaders with the diverse matrices through which the school is evaluated. As faculty and staff develop professionally, job satisfaction and retention rates should remain high. The plan will be finalized by June 30th, 2017 and will be implemented during the 2017-2018 school year.
 - The Executive Director and Head of Montessori Curriculum and Instruction are systematizing the leadership structure to ensure grade-level leadership is rolled up to inform admin decisions.
 - Executive Director is establishing a professional development committee to structure the leadership functions clearly, carving out roles that are identifiable and thereby allowing more than spot cross-training to happen. Multiple people have stepped forward who are interested in providing training to their peers or leading professional learning communities.
 - In the 2017-2018 school year, speakers will be invited to speak on specific leadership topics.
 - Those leading professional communities will be assigned a leadership book to be studied over the course of the year. Suggestions for books are: The Leadership Challenge; Difficult Conversations; and The Heart of Change.

- Organizational Strength Initiative (leadership):
 - Pursuant to Georgia law, governance will schedule training through GCSA and ensure that all trustees receive the following training by July 31, 2017:
 - Existing Members: 3 hours of Financial Governance, 3 hours of Whole Board Governance, 3 hours of topics aligned with standards for effective governance.
 - 3 hours Whole Board Governance completed by: Elizabeth Berenguer, Michelle Candline, Teri Cornelius, Dave Gibson, Justin Hummel
 - 5 hours strategic planning: Elizabeth Berenguer, Michelle Candline, Teri Cornelius, Justin Hummel
 - 2 hours Financial Governance: Elizabeth Berenguer, Michelle Candline, Teri Cornelius, Justin Hummel, Dave Gibson
 - New Members: 3 hours Best Practices on Charter School Governance, 3 hours Charter School Finance and Budgeting, 3 hours Financial Governance, 3 hours Whole Board Governance, 3 hours topics aligned with standards for effective governance.
 - 3 hours Whole Board Governance: Tamara Avant
 - 5 hours Strategic planning: Tamara Avant, Tim Blackston, Spencer Burch
 - 2 hours Financial Governance: Tamara Avant
 - During the 2016/2017 academic year, governance will review and maintain current and accurate Bylaws, Charter documents, Board Manual, and other necessary resolutions, notices, and similar documents.
 - Governance reviewed Bylaws on 12/16/16 and suggested some changes to accurately reflect operations
 - Governance adopted Resolution on Immediate Past President Appointment as Ex Officio Affiliate on 12/16/16
 - Board voted to adopt the Resolution on Immediate Past President Appointment as Ex Officio Affiliate at monthly meeting on 12/19/16
 - Tasked Finance with updating Fiscal Policies
 - Board voted to approve amended Bylaws at February 2016 monthly meeting.
 - Updating strategic plan
 - Pursuant to CEMCO Bylaws, during the 2016/2017 academic year governance will strategically assign each trustee to serve on at least two committees, taking into consideration the trustee's experience, background, and abilities.
 - Tamara Avant (parent, education administrator, highly organized): Academic Excellence (Chair), MCO
 - Elizabeth Berenguer (parent, attorney, educator): Governance (Chair), Human Resources (Chair)
 - Tim Blackston (community trustee, higher ed administrator, HR experience): Human Resources, Academic Excellence
 - Spencer Burch (community trustee, engineer, strong community contacts): MCO
 - Michelle Candline (parent, highly organized, process-oriented): Governance, Human Resources
 - Dave Gibson (parent, PTO Trustee, strategic thinker): Finance, Facilities
 - Jose Gonzalez (parent, active in PTO): MCO, Facilities
 - Justin Hummel (businessman, former school board member in PA, community trustee): MCO (Chair), Finance
 - Jay Jones (County Commissioner, parent): Facilities, Finance
 - By the end of the 2016-17 school year, the AEC, led by the Writing Assessment Subcommittee, will have guided the school-wide completion of a standardized, K-5 pre- and post-narrative writing assessment, including implementing grading procedures and providing instructional guidance as applicable. Plans will also be in place for this protocol to extend to include narrative, opinion and informational writing for the 2017-18 school year.
 - Fall writing assessments have been completed. Teachers have been trained on rubric. Database has been created to include scores (deadline of February 28 for data entry).
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- Trends across the grade-level that may impact resources/training will be analyzed. Writing Assessment Subcommittee will present data at a staff meeting to ensure all are aware of its utility before the end of the academic year.
- Financial Sustainability Initiative (budget-funding formula implementation):
- By the end of the 2016-17 school year, the AEC will research the requirements and put provisional plans in place for the roll-out of an Early Intervention Program (EIP) at CEMCS for the 2017-18 school year.
 - ED has met with EIP district specialist and has manual.
 - Provisional plan will be in place by April (how many can be served and what services are needed). At that time, ED will call district support person in to review for 2018-19.
 - First reporting will be October 2017. Children will have to be assessed in Fall (will use that benchmarking).
- By March 1, 2017, the ED and Upper Elementary representatives on the AEC will compile an informational flyer on Gifted Education testing and services in the SCCPSS, with the intent of supplying Upper Elementary parents this information in advance of their child's graduation from CEMCS.
 - ED and UE met to discuss what services would entail. One teacher in UE is gifted certified. Must offer 5 hours of service a week to children to qualify.
 - ED and UE have meeting Feb 14 with district to determine how to serve students. Will reach out to parents after. Goal is to offer services to students, but most importantly to create a pipeline for them to middle school.
 - Current 5th grade students' parents have been contacted. Reviewing process for next academic year.
- Achieve 75 pts or greater on the Fiscal Compliance rubric as defined by the State Charter School Commission's Comprehensive Performance Framework. 75 points are to be achieved by the end of FY17 to support our Charter renewal application.
 - The committee evaluated our standing (approximately mid-year) and determined we are meeting this goal. We are projected to sustain our standing through FY17. Grading Rubric Benchmarks:
 - Measure 1a: Working Capital Ratio: (20/20 pts)
 - Measure 1b: Unrestricted Days Cash (10/20)
 - Measure 1c: Enrollment Variance (10/10)
 - Measure 1d: Default (10/10)
 - Efficiency Margin 2a: (20/20)
 - Measure 2b: Debt to asset ratio: (15/20)
- Facility Improvement Initiative (permanent facility):
 - To realize a permanent facility that replaces the cottage structures in the near future followed swiftly by the remaining modular buildings. All facility improvements are to enrich the academic goals of the school and provide for a healthy, functional and beautiful campus. All facility improvements are to be fiscally responsible and not create an unreasonable burden for future stakeholders. The milestones for achieving this goal are below.

<p>Path to a facility:</p> <ol style="list-style-type: none"> 1. ESA Phase I 2. Programming 3. Geotechnical report 4. Utility capacity and water detention analysis 5. Generate Master Plan based on findings from items above. 6. Obtain pricing for work. 7. Finalize scope of work according to amount of funding secured. Submit for funding. 8. Issue RFP for Architectural & Engineering services (5-10 months min.) USDA loan requires 	<p>Progress Toward Goals:</p> <ol style="list-style-type: none"> 1. Complete 2. Complete. To be revised as needed. 3. Complete. Report under review. 4. Septic report submitted. Water analysis underway. 5. Nearing completion. 6. Construction estimator to be enlisted? 7. Grey Mountain Charter Financing to lead in developing funding model. 8. Not in progress
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this step to occur prior to submitting application. 9. Begin construction (approx.10 months)	9. Not in progress
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- Secure funding source for a permanent facility by the end of FY17.
 - Grey Mountain Charter Financing has been enlisted to lead us through various funding options and secure a funding source. The scope of the project is being defined by the Facility Committee in conjunction with Finance and GMCF.
- Facility Improvement Initiative (determine needs based on school size/programming):
 - To assist and oversee the Business Manager in engaging with and evaluating CEMCO contracts on a monthly basis. The objective of this goal is to ensure CEMCO is engaged in contracts and services that offer the best quality for the school while meeting budgetary needs for Facilities Expenditures.
 - The Business Manager has generated a spreadsheet listing all contracts, the cost of contract, renewal date, and review dates among other information. The review of this document is a standing agenda item for the Facilities Committee.
 - The Facility Committee is to conduct a Facility Conditions Assessment on an annual basis. The FCA is to entail a thorough visual inspection of every room in every building on campus in order to assess the overall condition of the facilities and identify areas in need of repair or replacement. A written report is to be generated based on the inspection. The report is to include a brief summary followed by an itemized list of deficiencies as well as recommendations to remedy noted deficiencies. Photographic documentation is to be included. The walkthrough is to take place shortly after the start of Summer Break in order for any repairs or replacements to be conducted before the next school year.
 - Task has been assigned to Dave G. for initiating list of room/spaces. Date for the walkthrough is TBD.
- Financial Sustainability Initiative (resource development/marketing):
 - Establish Reserve as part of Measure 1b by securing 50 days cash on hand by the end of FY17 to provide 15/20 points before our next charter renewal. The entire 80 days cash on hand is to be fulfilled by the end of FY19. Beginning at the start of FY17, transfer 10% of goal amount every month until 50 days cash on hand is reached.
 - Daily expense and number of days cash on hand are tracked on financial documents. At this time, we are not projected to secure 50 days cash on hand by the end of FY17 due to the administrative fee issued by SCCPSS. It has been determined that not achieving this goal will not be detrimental to our overall financial performance.
 - Recruit and train a minimum of five CEMCO Ambassadors from the PTO to engage in marketing and community outreach.
 - Five Ambassadors were recruited at the January PTO meeting.
 - DX Marketing developed an Ambassador Packet of materials to provide to Ambassadors, including flyers, handouts, and yard signs.
 - Ambassadors will be trained and assigned to recruitment, retention, or fundraising efforts after the February PTO meeting.
 - Progress toward Ambassador involvement will be evaluated at the May MCO meeting.
 - Recruit new student applications at all grade levels, with a special focus on lower elementary, to fill all slots at each grade level with a wait list.
 - DX Marketing sent out one mailing and will send another.
 - Flyers (an additional 250) and yard signs (50) are being printed for distribution/placing.
 - A digital billboard will run for 4 weeks.
 - A Facebook campaign will begin, targeting parents/families.

- Develop corporate partnerships for fundraising, with a focus on the school garden and green space. Obtain a minimum of five (5) corporate sponsors and/or a minimum of \$55,000 in corporate donations by the end of the 2017-2018 academic year.
 - Committee members will make local contacts and report on progress at the March MCO meeting. (Justin will reach out to the Farmer’s Market and A-Town Get-Down event; Marty will reach out to Kroger and Earth Day event organizers).
 - A list of potential partners will be solicited from Ambassadors and reported at the March meeting.
 - CEMCO will apply for the Metropolitan Savannah Rotary Annual Service Organization grant prior to the March 24 deadline.
 - The Board will discuss banner advertisements on the CEMCO fences at the February board meeting.
 - Goal to sell five \$2000 banners for the 17-18 school year.
- Financial Sustainability Initiative:
 - Generate, adopt, and document CEMCO fiscal policies. The Committee is to review (2) policies at a time and issue to The Board for final review and approval. This process is to be a standing agenda item until The Committee determines all necessary policies are established.

IV. MONITORING

Recommended Monitoring Cycle

In order to successfully execute the action and attain the goals set forth in this plan, consistent and timely monitoring must be conducted. It is recommended that the plan be monitored on at least a quarterly basis. It is recommended that the plan be officially adopted at the September 2015 board meeting with the first monitoring period occurring in January 2016. The following is an illustration of a recommended approach to monitoring:

