

Bay Farm Montessori Academy

Long-Range Strategic Plan

Introduction

In the fall of 2011, the Board of Trustees of Bay Farm Montessori Academy (Bay Farm) initiated a strategic planning process focused on creating a ten-year plan for the school. At the center of the effort was a sixteen person committee, made up of board members, administrators, teachers, and parents. This committee met regularly for nine months, and it reached out to the broader Bay Farm community via surveys, interviews, and an open board meeting. The final output is this report, which details Bay Farm's ten-year vision and outlines seven areas of focus, as well as action goals that will guide the board and administration toward achieving the vision.

In writing this report, it became clear that we remain committed to several elements that currently exist at Bay Farm, including:

- The Montessori approach to teaching and learning
- A toddler through eighth grade program
- Outstanding academics
- Diversity
- Strong, integrated visual and performing arts program
- Focus on developing academically, socially, and emotionally balanced children
- A close community made up of students, staff and parents

Ten Year Vision

In 2023, Bay Farm is an independent Montessori school offering an innovative Toddler through Grade 8 program in a warm, nurturing environment to a diverse student body of approximately 220. Parents are committed to the School's mission and serve as active volunteers and supporters. The School's challenging academic program is widely considered one of the best on the South Shore and it is supported by strong and passionate teachers. The integrated curriculum balances mathematics, science, the humanities, and foreign languages, and includes a visual and performing arts program, as well as physical fitness activities. Bay Farm's attractive campus features well-maintained facilities and beautiful, natural landscaping. The School has a strong financial profile highlighted by full enrollment, a generous financial-aid program, and a growing endowment. Our students matriculate to the school of their choice, including highly-selective private schools, and leave Bay Farm confident, well-prepared, and highly-motivated to make a difference in the world.

Reach Full Enrollment

Bay Farm began fiscal year 2014 with 184 students. Our ten-year target enrollment is approximately 220 students, which is detailed by level below. We believe that reaching target enrollment would enhance the student experience as peer group size would increase at the higher levels. Financially, Bay Farm would have increased resources, which could be used to enhance programming, enlarge the financial-aid program, and better maintain the campus. While 220 students is the ten-year goal, the Bay Farm student base will hopefully exceed this target in the long run.

| Level | Target | | Current | |
|------------------|----------|------------|----------|------------|
| | Students | Classrooms | Students | Classrooms |
| Todder | 25 | 2 | 31 | 2 |
| Children's House | 95 | 4 | 69 | 4 |
| Elementary I | 50 | 3 | 44 | 2 |
| Elementary II | 30 | 2 | 31 | 1 |
| Middle School | 20 | 1 | 9 | 1 |
| Total | 220 | 12 | 184 | 10 |

Action Goals:

- Enhance our retention efforts, particularly at key transition points at the end of kindergarten, third grade, and sixth grade. Focus on strengthening relationships between the School and parents and facilitate close relationships amongst the parents.
- When appropriate, add a third Elementary I classroom and a second Elementary II classroom. Existing physical space is available to meet this growth.
- As enrollment hits full capacity in a specific level, form a waiting list, which aids the admissions process, stabilizes total enrollment, and creates scarcity value for an open slot. Once a sizeable waiting list is built, consider expanding with an additional classroom to satisfy demand.

Attract and Retain an Outstanding Faculty and Administration

Bay Farm's strong faculty and administration is the heart of our school. In the last decade, we have significantly increased faculty compensation in an effort to ensure that our teachers are paid competitively relative to other local schools. Going forward, we will continue to employ the most talented teachers and staff possible and remain focused on maintaining high retention rates by offering attractive compensation and a great culture in which to work.

Action Goals:

- Assess and improve our recruiting process in an effort to enhance the pool of interested and diverse candidates for any given job opening.
- Beginning in fiscal year 2014, conduct a competitive compensation analysis every three years to ensure that our salaries and benefits are attractive to the best talent in the market.
- Examine our professional development efforts with an eye towards broad-based staff participation and increased funding if necessary and operating results permit.

Improve the School's Financial Position

In fiscal year 2011, Bay Farm returned to positive cash flow from operations after suffering through two years of losses due mainly to the poor economy and depressed enrollment. Even during the downturn, Bay Farm continued to retire long-term debt, which as of March 31, 2014, stands at \$860,000, down from \$2.5 million in 2000. The outstanding long-term debt is scheduled to be retired on a straight-line basis during the next ten years and is financed at low interest rates. Short-term debt, which is the result of cash flow gaps during the downturn, stands at \$234,000, down from approximately \$600,000 at the peak. Bay Farm's endowment, which was created in 2007, is approximately \$320,000 as of March 2014.

Our goal moving forward is to strengthen the school's financial position, defend against future economic downturns, and position Bay Farm to improve its campus and facilities.

Action Goals:

- Execute the recently created five-year plan that uses positive cash flow from operations to eliminate the short-term debt.
- Maintain financial aid in the current percentage range of 17-21% of total tuition revenues.
- Revamp the School's annual fundraising process, focusing on personal outreach, better education of prospective donors, and consistent follow-through. Foster a "culture of giving", highlighted by higher rates of parent participation and an increased number of leadership donors.
- Reinvigorate Bay Farm's long-term capital campaign, which will fund the campus redesign plan and grow the endowment. Capital fundraising should be managed carefully to ensure that the recurring Annual Fund is not impacted by reallocated gifts.

Clarify Diversity Objectives and Goals

Diversity has long been emphasized in the Bay Farm community. Our culture promotes understanding and respect for people of all background and beliefs. Our curriculum is globally focused, incorporating teachings about other cultures and religions, as well as foreign languages. While ethnic and racial diversity in Duxbury and the surrounding towns is relatively low (2-3% of population in Duxbury), Bay Farm attracts a diverse student body, made up of 15-20% racial and ethnic minorities.

At Bay Farm, diversity in the student population and curriculum will remain critically important for several reasons:

- Bay Farm graduates will live and work in an increasingly global and interconnected world. The ability to understand, appreciate, respect, and work with people of different backgrounds will be increasingly important.
- The South Shore is less ethnically and racially diverse than Massachusetts and the nation. Bay Farm can provide our students exposure to diversity that often cannot be matched in the community around them.
- Respect for every individual is central to Montessori values. Building respect for all others comes much more easily when one forms relationships with peers who come from varying backgrounds and with different beliefs.

Action Goals:

- Increase diversity in student enrollment with a long-term target of at least 25% non-Anglo students.
 - Grow enrollment diversity organically from nearby communities rather than "importing" diverse families/students from distant communities.
 - Emphasize outreach to diverse groups within nearby target towns as part of a broader effort to increase awareness of Montessori & Bay Farm outside Duxbury via a variety of channels (advertising, educational events, community group presentations, etc.).
 - Pay special attention to parents of non-Anglo students to make them welcome and help them build strong connections to/within the Bay Farm community (host family/parent, social events, MPA).
 - Promote diversity-centered philosophy and programming in marketing materials and outreach.
 - Consider establishing scholarships for children from diverse backgrounds for whom 50% financial aid is not sufficient (These scholarships should cover expenses beyond tuition, e.g. extracurricular activities, before and after care, etc.).
- Increase diversity in faculty/staff with a long-term goal of 25% non-Anglo faculty overall and 25% male faculty in the elementary and middle school.
 - Hiring decisions should continue to be based first on the candidate's ability and potential as a Montessori teacher.
 - Consider recruiting via teaching interns from other countries, investing in Montessori training of interns and assistant teachers from diverse backgrounds, establishing links with education graduate programs as a channel for recruiting diverse faculty.

- Maintain gender balance and increase diversity on the board, consistent with other board recruitment objectives.
- Continue to support at least present levels of diversity, inclusion, and multicultural programming in curricular and extracurricular activities; draw on parents from diverse families to participate in and support these activities.
- Pay attention to all dimensions of diversity in recruitment, staffing, and programming.

Improve the School's Campus

During the last 20 years, through the acquisition of several abutting lots, Bay Farm has assembled its nine-acre campus in Duxbury, MA. We believe the campus has large, somewhat unrealized potential. In 2012, the Board and Administration revised the Campus Plan, which aims to unify and beautify the campus, provide better solutions for parking and traffic flow, and add new buildings that satisfy unmet needs, such as an indoor athletic facility and expanded performing arts space.

Action Goals:

- Complete work that will add an athletic field, improve campus landscaping and redesign traffic flow by 2018, and upgrade arts and athletic facilities by 2023.
- Implement a thorough and detailed maintenance and repair plan for the existing facilities.

Enhance the School's Programming

Bay Farm currently provides a strong core curriculum, including humanities, languages, mathematics, and science, supported by an outstanding, integrated performing and visual arts program. Our academics and arts emphasize multi-cultural education, teaching our students about other countries, cultures, religions and beliefs, and preparing them to contribute in a global environment. While we believe our programming is strong today, we acknowledge that there may be opportunities to broaden and strengthen our offering in areas such as athletics, technology, and music.

Action Goals:

- Conduct annually an analysis of potential programming enhancements. Focus on input from teachers and parents as well as competitive information regarding programming at local schools, as well as outstanding independent schools broadly. Three areas of immediate focus are athletics, expanded language classes, and musical instrument instruction.
- In fiscal 2014, form a Technology Advisory Committee that is responsible for creating a Technology Mission Statement and meeting regularly to discuss opportunities and progress with regards to technology enhancements in the school, particularly at the Elementary II and Middle School levels.

- Collaborate with strong, local organizations to see where partnering opportunities exist. Carefully weigh “build versus partner” decisions when expanding programming. In capital intensive endeavors, consider partnering opportunities to provide near or long-term solutions.

Committee and Board Members Who Participated in the Strategic Planning Process:

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