



# A BOLD MOVE FORWARD

STRATEGIC PLAN *for* MONTGOMERY SCHOOL



# LETTER *from the* HEAD OF SCHOOL

January 2018

Dear Montgomery School Community,

We are very pleased to present to you Montgomery School's five-year Strategic Plan, *A Bold Move Forward*. As we embark on our second century, this plan provides a dynamic blueprint designed to ensure the future health and growth of Montgomery School. Thanks to the time, effort, and commitment of the members of the Strategic Planning Committee, we were able to imagine our future and discover ways to grow and become stronger. In harmony with our mission and traditions, the plan articulates five strategic priorities for institutional improvement with a focus on:

- Enrollment Growth, Affordability, and Access
- Faculty Development to Support Teaching and Learning Initiatives
- Attract, Reward, and Retain Highly Talented Faculty and Staff
- Signature Strengths of the School
- Sustainability and Financial Stability

The transition from planning to implementation has already begun and there are several developments underway on our key initiatives. With thanks to our dedicated Strategic Planning Committee — comprised of faculty, administrators, alumni, parents and trustees — this group has identified both the opportunities available to Montgomery and the challenges facing the School. They considered issues around affordability, access, inclusion, our legacy and academic mission, and, of course, our commitment to the whole child. The result is a plan that will positively impact our entire community and ensure continued growth of the School.

The Strategic Plan reflects a lengthy review and consideration of survey data, National Association of Independent School trends, the school's statistics, past accreditation reports, and solicited feedback from major stakeholder groups, as well as intensive discussion and engagement with the Montgomery community at large. These contributions gave voice to our collective impressions of the school and created a shared vision for our future. The result is a multi-faceted and forward-looking vision, supported by robust strategic priorities. With this framework in place, we will be able to make clear and focused decisions about our future. We will capitalize on the creativity and inspiration of our faculty and administration. We will engage our community in new and exciting ways. We will ensure that all aspects of our academic, athletic and social programs are distinctive and serve our community. The heart of what makes Montgomery so special will not change, but simply continue to evolve.

Sincerely,



Sally Keidel  
Head of School



## OUR MISSION

Montgomery School ignites each child's love of learning and fosters their individual talents during the most formative years in order to prepare them for future success.

### WE PROMISE TO...

- know and challenge each child, and inspire them to reach their potential.
- cultivate an environment of mutual respect.
- promote the academic, social, and emotional development of each child.
- provide a challenging curriculum, designed to teach students how to become critical thinkers, active problem solvers, and confident leaders.

### WE BELIEVE IN...

- the power of community.
- a strong partnership between parents and educators to support the growth and development of each student.
- creating an enriching cultural environment.
- character development and teaching students the importance of personal integrity, respect, responsibility and service to others.
- preserving childhood for Prekindergarten through 8th Grade students.



# STRATEGIC PRIORITIES

1

## Enrollment Growth, Affordability, and Accessibility

Seek affordability, access, and diversity opportunities while enriching our vibrant community through enrollment growth.

Since the nationwide economic recession of 2008, the rising cost of private education has grown steadily above rates of inflation at 2.6% to 4.1% per year. To address the changing environment, Montgomery School must continue to review how it structures tuition and grants tuition assistance. A task force comprised of Administrators and Board members has conducted an in-depth review of current tuition and financial aid policies. Montgomery's practices were benchmarked against those of other schools and current best practices. Policy changes proposed by the committee have been approved by the Board of Trustees.

### FOCUS OF EFFORTS

- Conduct a value proposition market study to determine the drivers of enrollment demand, including tuition pricing and tuition assistance, outreach, and word-of-mouth marketing.
- Determine, based on the results of the school's market study, realistic enrollment and net-tuition expectations and reverse engineer expenditures accordingly.
- Effectively communicate with the parent body, current and prospective, the school's commitment to tuition assistance as a vehicle to strengthen the school, secure its future, and fully enroll the school with a mission-aligned, ambitious, and diverse student body.

2

## Faculty Development to Support Teaching and Learning Initiatives

Invest in faculty professional development to ensure our students benefit from new teaching and learning initiatives.

Montgomery School's exceptional educators inspire curiosity and a love of learning while preparing students for a dynamic, successful future. Implementing numerous methods, such as mentoring groups and professional development, will allow our faculty and staff to broaden their knowledge and awareness, especially as it relates to differentiation and innovation in education. With significant resources dedicated to this initiative, our teachers will continue to grow exponentially as professionals and leaders in our community.

### FOCUS OF EFFORTS:

- Define the school's desired balance between traditional and innovative teaching methods, and develop professional development opportunities to support faculty in this initiative.
- Backward design the PreKindergarten - 8th grade curriculum, with an overlay of student outcomes related to the 5C's (character, creativity, critical thinking, collaboration, communication + cross cultural competencies).
- Research and adopt multiple methods of assessing learning outcomes and use aggregated information from the assessments to effectively support and challenge students.
- Support faculty to increase differentiated instruction, so that all students work at an appropriate level of challenge and support.

3

## Exceptional Faculty and Staff

Attract, Reward, and Retain Highly Talented Faculty and Staff

The exceptional quality of our faculty is a key distinction of Montgomery School and a primary factor that attracts families and students to enroll. Our talented and dedicated teachers, administrators and support staff are vital to the long-term success of Montgomery. Our goal is to devote increased attention and fiscal resources to ensure that we continue to attract and retain the best educators, provide effective guidance and evaluation, and offer first-rate opportunities to promote and support professional growth and development.

### FOCUS OF EFFORTS:

- Develop a compensation and benefit strategy that attracts and rewards teachers who enhance the student experience through optimal performance.
- Evaluate our hiring process to ensure we attract and retain teachers who encompass a deep respect for early childhood education. Identify and hire faculty who make the best fit for our culture and are committed to living our mission.
- Continue involving the faculty in defining the expectations for professionalism, optimal performance, and engagement with our community.

*continued* ►



# STRATEGIC PRIORITIES *continued*

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## Signature Strengths of the School

Identify and capitalize on the school's distinctive qualities as they relate to student development and outcomes.

As we prepare students for the complex challenges they will face as adolescents and adults in a rapidly changing world, we strive to offer educational excellence that distinguishes Montgomery from other schools. We will enhance our academic programs and strengthen the curriculum and pedagogy in all areas of study with an emphasis on 21st century skills such as critical thinking, problem solving, and collaboration. Our enriched program will also offer expanded opportunities for students to distinguish themselves in areas of special interest and ability.

### FOCUS OF EFFORTS:

- Analyze the competitive landscape and utilize research and data to assess our relative strengths and opportunities. Develop business and marketing strategies that highlight our signature strengths and elements of distinction.
- Ensure we have the ability to be agile and flexible to continuously strengthen our program and provide students with the best possible preparation for lifelong learning and success.
- Identify and emphasize key hallmarks, beyond the obvious factor(s) of being a “stand-alone” PreK-8 school (e.g. character education, differentiated instruction, public speaking preparation, arts and music preparation, outdoor education, and PreK-8 STEAM/experiential science).

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## Sustainability and Financial Stability

Secure financial stability and sustainability to support the future of the school.

Montgomery School is dedicated to developing a clear, comprehensive financial plan that supports the current level of success and provides us with the resources we need to advance sustainability and carry out our long-range plans. We will build upon a diverse business model and a culture of philanthropy to ensure the financial stability of our School today and for many years to come.

### FOCUS OF EFFORTS:

- Effectively communicate the financial needs and goals of the school.
- Focus on meeting financial priorities in the short term, and develop a plan to establish an endowment in the future.
- Build a culture of philanthropy among all the school's constituencies, beginning with educating students and parents about the importance of early and continuous financial support.

## WE THANK THE MEMBERS *of the* STRATEGIC PLANNING COMMITTEE

### STRATEGIC PLANNING EXECUTIVE COMMITTEE

#### CO-CHAIRS:

Lori Ciprich P'20,'21,'24

Doug Gessl P'15,'17

#### TRUSTEES:

Dan Goldsmith, *Board Chair*

Tony DiFrancesco P'08,'11

Jeff Lipson P'19

Staci Seeley P'18

#### ADMINISTRATORS

Sally Keidel P'20,'23, *Head of School*

Carolyn Blair P'16,'18,'21,'23,

*Director of Athletics and Facilities*

Mark Dixon P'21,'22,'25, *Head of Middle School*

Deb Goggins P'17, *Director of Admission*

Marianne Kaplan P'18, *Director of Marketing and Communications*

Stacey Kley P'04,'06, *Director of External Affairs*

Susan Marotta P'19, *Lower School Head*

Mark Murray, *Director of Finance*

Allison Stinger P'20,'24, *Director of Development*

#### CURRENT PARENTS

Morreen Bayles P'18

Harry Carpenter P'12,'13,'17

Niall Doherty P'16,'22

Lauren Geary P'19,'20,'20

Murat Gungor P'20

Dan Ilaria P'23

Cindy Mastrangelo P'14,'17

Deirdre Zangwill P'21,'22

#### PARENTS OF ALUMNI

Patty Dahm P'15

#### FACULTY

Pam Clay P'26, *4th Grade Teacher*

Jared Hamilton, *Technology Director*

David Kline P'13,'17,

*5th and 6th Grade Science Teacher*

Heather Schelhorn P'00,'03,'05,

*Social Studies Department Chair,*

*Social Studies Teacher*

#### ALUMNI

Ted Pollard '59

Joshua Stewart '92



1141 Kimberton Road  
Chester Springs, PA 19425

610.827.7222  
[montgomeryschool.org](http://montgomeryschool.org)