

Jackson - Walnut Park Strategic Plan

Introduction

The following document has been prepared to help guide the JWP constituency through the next 3-5 years, with a primary focus on Year 1. It is anticipated that each member of the JWP community has a role to play as we seek to meet the long term objectives described in this Strategic Plan. Specific yearly objectives that support the Strategic Plan will be outlined for the Administration and the Board of Trustees. Included within this document are yearly objectives specific to each of the Board committees.

In this report we want to share several key elements of the Strategic Plan that have emerged from the conscientious efforts of the trustees and administrators which represent a broad blueprint that describes essential components of our schools while listing major goals to improve those categories. Yearly planning will be aligned with the more general goals and objectives of this Strategic Plan.

This is a living document and will be regularly reviewed by the Board in consultation with the Administration.

The Mission of Jackson Walnut-Park

Jackson-Walnut Park, an educational collaborative sponsored by the Sisters of St. Joseph of Boston, is a Catholic elementary school and Montessori pre-school serving children from 2.9 years of age through sixth grade. In unity with our children's families, we sustain and perpetuate a reflective, spiritually inspired, dynamic learning community.

The Vision of Jackson Walnut-Park

We are a campus that lives the unique mission and charism of the Sisters of St Joseph, fostering unity, the love of one's neighbor without distinction, reflection and action. We believe that, each and every child has a gift to share and, if guided appropriately, will begin to harbor an ethos that calls them to reach their highest educational potential and ultimately to shape a better world by their actions. Our children, for whom we hold the highest aspirations, will climb on the ladders we construct, toward futures filled with faith and science, with art and invention. So, at JWP we nurture the mind, the body and the soul and in so doing, prepare our students to share their individual gifts in the world as they come to discover and love it.

The guiding principle that unifies our two schools, Walnut Park Montessori and Jackson Elementary, is our belief that to effectively teach, we must first seek to know and appreciate the child as an individual. This understanding enables the application of differentiated teaching strategies that seek to engage and challenge each child to identify and reach their potential and to recognize their own gifts and talents.

Under this umbrella of Community, defined by the charism and mission of the Sisters of St Joseph and our philosophy of approaching the child as an individual, the two schools offer a unique experience for children. The bridge joining us is the self-actualized learner – achieved compatibly between a Montessori preschool using a Montessori instructional method and a Catholic elementary school using the approach of Differentiated Education. Philosophically, a child emerges from our preschool inculcated in the value – “I take and I give back” they then move on to our elementary school where they are empowered to meet the catholic ‘call to serve’ through the instruction they receive there. Each of these philosophies supports the self-actualized learner who is the best candidate to perpetuate the CSJ charism and improve the world by his/her participation in it.

All children in the JWP community experience the school day in a way that enhances their curiosity and creativity so that they begin to view themselves and their ideas as important, and valued by the class and their community. This inspires them to become self-motivated learners who seek to identify their own special gifts and abilities and use them for the common good. A child who has found their passion is a child who will seek to discover and improve the world.

Goals and Objectives

In order for the Jackson Walnut Park community to achieve the described vision we must work to:

- achieve financial sustainability
- ensure an environment that emulates the charism of the Sisters of St Joseph
- ensure that the efforts and specific programs utilized to develop self-actualized learners are nurtured and continually enhanced

Therefore, to create the preferred future for the JWP community, the Board has established the following strategic goals:

Goal 1: Within 3-5 years build a financially strong (self-sufficient) organization that will ensure the long term viability of JWP.

Goal 2: Ensure that the CSJ mission and charism is effectively embodied and communicated to all constituencies

Goal 3: Provide an educational opportunity for children that embodies a Differentiated Education approach, manifest in the Catholic and Montessori based educational philosophies practiced on this campus, to prepare students academically and ethically for the next stage of their educational experience.

Each year we will work towards achieving these long term strategic goals by taking specific actions. The goals for Year 1 and Year 2 are as follows:

Year 1

- Goal 1: Create a financial plan governed by guidelines appropriate to our mission, which will result in a balanced budget for JWP for the next 3-5 years. Gain Board and Administrative understanding of and support for this plan.
- Goal 2: Focus all constituencies of JWP on Unity and Reconciliation to ensure that these elements of the CSJ charism are effectively embodied, practiced and communicated internally and externally.
The community will explore and implement this goal by embracing:
Unity, embodied as the school community utilizes shared resources including a common administrative team, shared communication resources, and cooperative decision making and conflict resolution processes.
Reconciliation embodied as all members of the school community seek to understand differences, recognize ruptures in relationships, and search for common understandings in order to be a reconciling presence in and among all they encounter.
- Goal 3: Ensure and support the Administration as they seek to define, acquire, and implement educational initiatives to further the development of our children as self-actualized learners.

Year 2

- Goal 1: Implement actions to ensure that the financial plan continues to be reflective of the economic realities, and clearly puts JWP on the path to financial sustainability.
- Goal 2: Focus all constituencies of JWP on Love of Neighbor, Without Distinction, an essential component of the CSJ mission and charism to ensure that it is effectively embodied, practiced and communicated internally and externally.
- Goal 3: Ensure and support the Administration in achieving sustainability of the ongoing educational programs and initiatives that are geared towards developing the self-actualized learner.

BOARD COMMITTEE SPECIFIC GOALS

Finance Committee

Primary Focus on Strategic Goal #1

- Goal 1: Create a financial plan governed by guidelines appropriate to our mission, which will result in a balanced budget for JWP for the next 3-5 years. Gain Board and administrative understanding of and support for this plan.

Tactical Objectives:

- Work with Sponsor and Administration to create a financial model to track, forecast and analyze revenue and income streams, monthly, quarterly and annually; to introduce the use of comparative financial ratio analysis; and to provide financial reporting in advance of each Finance Committee meeting. These tasks are to be completed by June 2010
- Using historical and budget information, and information from relevant committees, identify necessary enrollment numbers and projected tuition increases to achieve balanced budgets beginning in FY11 and to achieve the goal of tuitions and other income (exclusive of fundraising) covering 100% of costs by the end of FY12. Provide these to the Board for planning and approval purposes.
- Assess financial impact of providing after school and summer programs, existing and proposed, and provide this information to the Board, beginning with FY2010.
- Set the initial financial target for the annual development campaign to be the self sufficiency of the Collaborative structure (no financial support needed from the schools), by the start of FY11.
- Starting in FY10, provide an annual target dollar figure to the Mission Advancement Committee to commence and grow a permanent endowment once the annual fund has stabilized at a level to achieve break even or better results for the combined Collaborative.
- Perform regular analysis of the salary structure for faculty and staff in light of annual changes in enrollment and tuition, and fundraising revenues as part of the annual budgeting process
- Provide financial impact analysis, on an as needed basis, to committees and administrators related to various ideas for the fuller utilization of all physical plant resources, etc.

Desired Results:

- Actual fiscal year financial results that meet or exceed a break even budget.
- Financial information and forecasts that support decision making of the Board and Administration.
- Faculty salaries that are relevant to the market and a sustainable budget.
- The commencement and growth of a permanent endowment fund.

Responsible Parties: Board Finance Committee in conjunction with Board and Administrators, as appropriate.

Mission Advancement Committee

Primary Focus on Strategic Goal #1

- Goal 1: Create a financial plan governed by guidelines appropriate to our mission, which will result in a balanced budget for JWP for the next 3-5 years. Gain Board and administrative understanding of and support for this plan.

Tactical Objectives:

- Working with the President, the Director of Mission Advancement, and the Admissions Director, the Mission Advancement Committee and Finance Committee, will assist in identifying and cultivating donors in an effort to establish a Scholarship Endowment. The Mission Advancement Committee working with the President and Mission Advancement Office aims to raise \$33,000 per year for the next three years to a scholarship endowment
- Increase the Mission Advancement Committee membership with at least two professionals who have advancement skills and resources, adding the first member by April 2010 and the second member by April 2011.
- Work with the Mission Advancement Director and the President to increase fundraising dollars to \$300,000, at minimum, for 2009-2010.
- With assistance from advancement professionals, educate all constituencies at JWP around the culture of philanthropy in an effort to increase the level of overall fundraising by June 2010. President and Mission Advancement Office to establish visits per annum, work with parent volunteer, Larry Furey of Partners in Mission and expand campus participation from 35% to 50% for the 2011-2012 year

- Working with the President and Mission Advancement Director help to identify and communicate to potential donors JWP's mission and core values of unity and reconciliation, love of one's neighbor, a shared vision, and educational philosophies.
- Ensure the President and Mission Advancement Director identify and design fundraising programs that reach out to the wider philanthropic community. Continue to grow constituency database by continuing to reach out to past parents and alumni. Establish a Scholarship Endowment fund by June 2010.
- Ensure the Board of Trustees' target goal of \$28,000 toward Annual Fund contributions for 2009-2010 is achieved. Increase Board goal by 5% each year.

Desired Results:

- The establishment of vibrant philanthropic constituencies.

Responsible Parties: Board Mission Advancement and Finance Committees, President, Mission Advancement Director, Admission's Director (when appropriate), Administrators, and Board committees.

Education and Technology Committee

Primary Focus on Strategic Goals #2 and 3:

- Goal 2: Focus all constituencies of JWP on Unity and Reconciliation to ensure that these elements of the CSJ charism are effectively embodied, practiced, and communicated internally and externally. The community will explore and implement this goal by embracing:
Unity, embodied as the school community utilizes shared resources including a including a common administrative team, shared communication resources, and cooperative decision making and conflict resolution processes.
Reconciliation, embodied as all members of the school community seek to understand differences, recognize ruptures in relationships, and search for common understandings in order to be a reconciling presence in and among all they encounter.
- Goal 3: Ensure and support the Administration as they seek to define, acquire, and implement educational initiatives to further the development of our children as self-actualized learners.

Tactical Objectives:

- Understand the specific initiatives, attributes, technology, tools and training utilized and/or needed by each school to develop the self-actualized learner. Educate the Board on the merits of these needs so they can be incorporated into

financial planning, marketing, mission advancement and other communication tools. By the January 2010 board meeting create a list of criteria upon which initiatives will be assessed.

- Meet with the Administration at least twice a year (once in January and once in the spring) to understand the technologies or initiatives they are currently using to meet the objective of developing self-actualized learners. Circulate minutes from the meeting within 2 weeks of meeting date.
 - Review with the Administration, on an as needed basis, any new technology/tool/training initiatives they would like to implement in order to gain a better understanding of their merits. Circulate minutes from the meeting within 2 weeks of the meeting date.
 - When appropriate, advocate for the Administration in its efforts to gain new technology/tools/training that supports the overall goal of developing the self-actualized learner.
- Educate the Board about trends in instructional practices and the challenges of implementing change in an academic environment.
 - At least once a year, present (or invite experts to present) to the Board information related to selected educational topics.
 - Provide articles of interest to Board members on these topics via email or during Board meetings.
 - Meet with the Admissions Director once a year to gain an understanding of the issues associated with recruitment, enrolment and admissions.

Desired Results:

- A Board which understands the approach and merits of the Differentiated Education and Montessori approaches and appreciates the way in which they contribute to the development of self actualized learners.
- An Administration who feels supported by the Board in their efforts to acquire the training and tools needed to support our common goals.
- Effective communication of our shared vision so that the internal and external constituents can identify who we are and understand how individual schools can be unified by their unique approaches to develop self actualized learners.

Responsible Parties: Education Committee in conjunction with Board and Administrators, as appropriate.

Building and Grounds Committee

Primary Focus on Strategic Goal #1

- Goal 1: Create a financial plan governed by guidelines appropriate to our mission, which will result in a balanced budget for JWP for the next 3-5 years. Gain Board and administrative understanding of and support for this plan.

Tactical Objectives:

Facilities Master Plan

- Develop a Facilities Master Plan that is in alignment with the Financial Plan to assure the maximization of all physical and technological resources for the benefit of the entire school community.
 - Examine the potential of facility usage and expansion and identify any potential issues/needs that are necessary to meet the financial goal and present to Board for approval by May 15 2010.
 - Determine capital improvements which should be made to the physical resources, on an as needed basis, in keeping with the financial model/goal and present to Board for approval by May 15 2010.

Communications to Constituencies regarding Facilities Master Plan

- Prepare communication materials to be shared with *all constituencies of JWP in the fall of 2010* that explain the Facilities Master Plan and the rationale for the Plan, *emphasizing the importance of working together for the benefit of the entire school community.*
- Ensure and support the maintenance and enhancement of the physical plant as necessary *and for the benefit of the entire school community.*
- Consider the implications and advise the Board and Administration by May 15 2010 as to the expanded use of the facilities beyond their primary educational purpose *in an effort to achieve long term sustainability which will benefit the entire school community.*

Desired Results:

- The completion of a Facilities Master Plan that is in alignment with the financial goal of long term sustainability.
- An educated constituency regarding physical plant usage and long term plans.
- Completed bathroom renovation on the top floor of Walnut-Park during summer of 2010.
- A schedule of proposed uses for the facilities beyond their primary educational purpose.

Responsible Parties: Building and Grounds Committee, in conjunction with Board, Administrators and Consultants, as appropriate.

Committee on Trustees:

Primary Focus on Strategic Goals # 1 and 2

- Goal 1: Create a financial plan governed by guidelines appropriate to our mission, which will result in a balanced budget for JWP for the next 3-5 years. Gain Board and administrative understanding of and support for this plan.

- Goal 2: Focus all constituencies of JWP on Unity and Reconciliation to ensure that these elements of the CSJ charism are effectively embodied, practiced and communicated internally and externally.

The community will explore and implement this goal by embracing:

Unity, embodied as the school community utilizes shared resources including a common administrative team, shared communication resources, and cooperative decision making and conflict resolution processes.

Reconciliation embodied as all members of the school community seek to understand differences, recognize ruptures in relationships, and search for common understandings in order to be a reconciling presence in and among all they encounter.

Tactical Objectives:

- Identify individuals for service on the Board whose values and actions are consistent with the charism of the Sisters of St. Joseph and who have the ability to contribute to the financial stability of JWP and/or who bring expertise required to lead the institution into the future.
 - Develop profile of optimal board membership and share with the board by February 10, 2010.
 - Develop profile of current board membership.
 - Each board member will identify one prospective board candidate by Jan 30th of each Fiscal Year (July-June) each year who brings needed expertise and who will also support the financial sustainability of JWP.
 - 100% board participation for financial contributions to JWP Annual Fund each Fiscal Year.
- Cultivate trustee appreciation of the CSJ mission through activities and programs.
 - Offer new trustee orientation on an annual basis to cultivate the mission and charism of the CSJ's.
 - Each board meeting, committee meeting and annual retreat will begin with prayer and reflection related to Unity and Reconciliation as components of the CSJ mission.

- Provide on-going education for Board members to assure their understanding of the current and future core components of JWP.
 - Offer four educational presentations through oral presentations or written and electronic communications reflecting the core components of JWP during the academic year.
- Maintain a full complement of members of the Board at all times.
 - The board will consist of eighteen members by September 1, 2010.
- Beginning with orientation for new members, provide professional development opportunities as a component of each full Board meeting and at the annual retreat.
 - Professional development related to the role of board membership will be provided at the new member orientation and at the annual retreat.

Desired Results:

- An informed and engaged Board and an informed Sponsor

Responsible Parties: Committee on Trustees in conjunction with Board and Administrators, as appropriate.