



Strategic Planning Charter Document



2014-2021

Document updated August 2017

Vision, Mission, and Core Values

Strategic change is about identifying who we want to be as an organization and then creating plans to bring about that change. Strategic Change is about improving in *specific and measurable ways*, and for Three Tree Montessori School (TTMS) this means continually working to achieve our vision.

Three Tree Montessori School Vision

Three Tree Montessori School provides an excellent academic education that empowers children to become independent, creative, empathetic life-long learners who will build a better world.

Elements of the TTMS Strategic Plan

Three Tree Montessori School has a **Strategic Plan** which is framework we use to make our vision a reality. Our strategic plan begins with a **Vision Statement**; a long-term objective that will guide us for many years. Every few years we establish a new **Mission Statement** which defines the specific and measurable ways in which, over a specific timeframe, we will move closer to the vision. We have also defined our **Core Values** which are statements we ground our work in so as we move forward, we never lose sight of what matters to us most. Finally, our **Strategic Results Areas** are the defined and measurable goals for our school. Together, these elements create a framework for our staff and community to understand where we are headed and how to contribute to our progress.

Our Mission

By September 2021, Three Tree Montessori School will be an exemplary Montessori school with staff and facilities to serve toddler through junior high school programs.

We will do this by:

- Defining, installing, and maintaining a high performance culture;
- Improving the quality of service to all members of our community: children, parents, staff, alumni, and greater community;
- Improving the utilization of skills and experience of our parents, staff, alumni, and extended community; and
- Creating a responsive model of growth and facility development to meet and anticipate our community's needs.

We will be the preferred educational experience for children in South King County and beyond.

Core Values

1. **Excellence in Education.** Three Tree Montessori School celebrates the formation of the universal child by providing excellence in education. We do this by following the philosophy and teachings of Dr. Maria Montessori and the Association Montessori Internationale.
2. **High Performance Culture.** We believe a stable environment leads to a strong foundation where children, families, and staff have the opportunity and freedom to grow academically, socially, and emotionally. We maintain the confidence of our children, families, and staff by creating a high-performing culture, engaging in transparent and informed decision-making, and utilizing sound financial practices.
3. **Safety.** Safety of the children is paramount in every decision we make and every action we take. We create a safe, secure environment as part of our work to maintain the confidence of the parents who entrust their children to our care.
4. **Community Involvement and Connection.** Three Tree Montessori School values the commitment that our students, families, staff and community make to our school. We honor that commitment by providing an environment of service, awareness, respect, and connectivity within and amongst classrooms, school, home, and the broader community.
5. **Diversity.** We value human connections. Our school reflects, embraces, and celebrates the diversity within our community.
6. **Integrity.** We acknowledge the necessity of preserving our core values and vision in this ever-changing world. Three Tree Montessori School proactively creates our future through planning, leading, and implementing with integrity.
7. **Earth Friendly.** We have an ecological interdependency with our earth. Through global awareness, we work as a community to honor, connect to, and preserve our local environment through conscientious daily practices.

Strategic Plan Task Forces

Organizations greatly improve their effectiveness when they involve everyone in creating strategic change. One way this is done is through Strategic Change Task Force Teams, or groups of committed volunteers from the community who are chartered with taking on a particular task within the Mission. The following are the Strategic Plan Task Forces at Three Tree Montessori School:

1. **Change Management Task Force** is responsible for the integration and collaboration of the Task Forces and will develop and implement systems to measure progress towards goals.
2. **Family and Community Relations Task Force** will develop processes for communicating with and providing services to parents and create a robust parent volunteer program.
3. **Site Development Task Force** will operate with two goals: (1) evaluate current and future facility needs and make recommendations for internal and external updates and (2) analyze the strategic plan's facility needs and make recommendations to the Board of Trustees.
4. **Academic Excellence Program Task Force** will develop a comprehensive strategy to document and communicate Montessori curriculum to the TTMS parent and external community, and will develop tools for professional development and evaluation of staff.
5. **Diversity Task Force** will perpetually work to define, communicate, and support the Three Tree Montessori School community in providing a diverse and equitable environment.
6. **Junior High Task Force** will focus on the understanding, preparation and implementation of a Three Tree Montessori School Junior High Program in the fall of 2021.
7. **Capital Campaign Task Force** will secure funding required to support site development and program expansion.
8. **Nido/Montessori Access Task Force** will focus on implementing Montessori's philosophical approach to infant development (birth to walking), and will be an interface of Three Tree Montessori and the broader community.

Strategic Change Roles

Board of Trustees are responsible for appointing the Change Management Task Force team, approving the final plan, and overseeing the execution of the plan.

Executive Director is responsible for executing the Strategic Change Plan as approved by the Board of Trustees and serves on the Change Management Task Force.

Task Force Team Leaders are responsible for leading a Task Force team in setting and meeting goals and reporting progress.

Strategic Results Areas: Goals and Metrics

Our **Strategic Results Areas** are the defined and measurable goals for our school.

Goal	Statement	Sample Metrics
Safety	We aim to provide a safe, secure environment for our staff, faculty, and families.	<ul style="list-style-type: none"> ▪ Reported safety incidents involving staff, parents, or children at the school or school sponsored event ▪ Incidents that could have resulted in a safety incident (near misses)
High Performance Culture	We aim to create an environment in which students, faculty, administration and families can—and are expected to-do their best work and maximize their potential.	<ul style="list-style-type: none"> ▪ Staff participating in professional development opportunities ▪ Number of active Task Forces, their completion of tasks, and progress towards goals ▪ Positivity scores on annual community survey – year to year
Parent Relations	We aim to clearly articulate processes, procedures, and volunteer opportunities to our community, and to empower our parent body to enact change within the school.	<ul style="list-style-type: none"> ▪ Service hours/month per family ▪ Percent of families who have engaged in the school community in the past 6 months ▪ Annual community survey questions regarding community involvement and connection
Program Excellence	We aim to continuously grow our school community and to be the preferred educational experience for students in South King County.	<ul style="list-style-type: none"> ▪ Student enrollment versus classroom capacity ▪ Established benchmarks for student academic performance ▪ Percentage of students completing each 3-year cycle
Financial Stability	We aim to strategically plan our financial future to support our growing programming needs.	<ul style="list-style-type: none"> ▪ Sum of assets versus liabilities ▪ Revenue from grants and donations ▪ Sum of fundraising expenses ▪ Number of students versus classroom capacity

Contact Information

We encourage you to contact us with questions, comments, and requests for volunteer opportunities. You are a critical part of this process and our success is determined by your participation.

Name	Title & Task Force	Contact
Tom Rzegocki	Executive Director Change Management Task Force	Tom.rzegocki@threetree.org
Nathan Riordan	Board President	Nate@riordan-law.com
Rachel Haas	Development Manager Change Management Task Force	Rachel.haas@threetree.org
Gracie Martinez	Admissions & Communications Manager Family & Community Relations Task Force	Gracie.martinez@threetree.org
Jeanette Rainge	Business Manager Site Development Task Force	Jeanette.rainge@threetree.org
Jessica Parks	Board Vice President Site Development Task Force	jasjspark@hotmail.com
Lynda Harrington	Elementary Guide Academic Excellence Task Force	Lynda.harrington@threetree.org
Gerri Yokers	Toddler Guide Nido/Montessori Access Task Force	Gerri.yokers@threetree.org
Amber Earley	Board Member Diversity Task Force	Amber.earley@gmail.com
Wayne Widdis	Consultant CEO & Founder of Focused Change Intl.	fciseattle@aol.com

STRATEGIC PLAN FRAMEWORK

CORE	VISION	Three Tree Montessori School provides an excellent academic education that empowers children to become independent, creative, empathetic life-long learners who will build a better world.								
	VALUES	Excellence in Education	High Performance Culture	Safety	Community Involvement & Connection	Diversity	Integrity	Earth Friendly		
	GOALS	Safety We aim to provide a safe, secure environment for our staff, faculty, and families.		High Performance Culture We aim to create an environment in which students, faculty, administration and families can, and are expected to, do their best work and maximize their potential.		Parent Relations We aim to clearly articulate processes, procedures, and volunteer opportunities to our community, and to empower our parent body to enact change within the school.		Program Excellence We aim to continuously grow our school community and to be the preferred educational experience for students in South King County.		Financial Stability We aim to strategically plan our financial future to support our growing programming needs.
STRATEGIC	ACTIONS	<ul style="list-style-type: none"> • Site Development Task Force • Elementary Handbook—risk assessments 	<ul style="list-style-type: none"> • Change Management Task Force • Academic Excellence Task Force • Annual Community Survey 	<ul style="list-style-type: none"> • Family Community Relations Task Force 	<ul style="list-style-type: none"> • Academic Excellence Task Force • Junior High Task Force • NIDO Task Force 	<ul style="list-style-type: none"> • Board of Trustees • Development Committee • Capital Campaign Task Force 				