



**ST. CATHERINE'S MONTESSORI**  
**HOUSTON, TEXAS**

# **2009-2013 Strategic Plan**

*Approved by Board of Directors*  
*October 13, 2009*

**ST. CATHERINE’S MONTESSORI**  
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**STRATEGIC FOCUS AREAS**  
**Summary List**

*Maintain and Enhance St. Catherine's Spiritual and Ethical Montessori Culture*

*Maintain and Enhance St. Catherine's as a Model Montessori Educational Experience*

*Maintain and Enrich the Diversity and Richness of the St. Catherine's Community*

*Maintain a Physical Plant That Furthers the Mission, Vision and Values of St. Catherine's*

*Strengthen St. Catherine's Governance Structure*

*Enhance St. Catherine's Development Program*

## STRATEGIC FOCUS 1

### Maintain and Enhance St. Catherine's Spiritual and Ethical Montessori Culture

**Overview:** St. Catherine's Montessori community is a culture of exceptional spiritual and ethical content. However, that culture is fragile and must be constantly reinvigorated in order to insure its continuation. The constant changing of students and parents makes this a permanent need for St. Catherine's.

The transition to the new physical plant has added a further imperative for clarity in what St. Catherine's stands for and its reason for being. How St. Catherine's develops its vision, values and mission is almost as important as what the vision, values and mission turn out to be. As a small school that does not plan substantial growth, St. Catherine's must be even more reliant on strong unity of purpose among parents, faculty, administration, Board, current students, alumni and external supporters.

**Results Objective 1** Regarding all aspects of St. Catherine's Montessori, encourage, support and enhance a school culture that:

Is child-centered, with every activity of the School reflecting an intense interest in and commitment to education of the whole child, improving each child's strengths as well as their weaknesses;

Uses reading, geography and mathematics to help children

- (i) develop connections outside the classroom,
- (ii) put things in a larger context, and
- (iii) develop global vision.

Creates a boundaryless environment through encouragement of unfettered communication and interaction among all class communities and children;

Values parental involvement and encourages each parent to embrace St. Catherine's as their School, a place where their participation in the education of their child and the associated activities of the School is invited, encouraged and welcomed;

Looks to the teacher and to the manager of the teaching staff as central to maintaining the integrity of the Montessori method and the spirit of St. Catherine's and as the principal agents for sending children home happy;

Gives teachers the resources they need to fulfill their mission towards every child, including those with special needs; and creates the environment of a “church family”

**Results Objective 2** Review, revise and reach strong consensus on the Vision, Values and Mission of St. Catherine’s, and then review those documents each year to insure they accurately reflect the School’s aspirations and desired direction.

**Results Objective 3** Create “job descriptions” for parents, teachers, administration, current students, alumni and the Board to make the Vision, Values and Mission of St. Catherine’s real by understanding the ownership of critical responsibilities.

**Results Objective 4** Conduct annual community assessments on how well parents, teachers, administrators, current students, alumni and the Board are performing under their “job descriptions”, and to what extent that performance has impacted the St. Catherine’s Montessori community either positively or negatively.

**Results Objective 5** With respect to *The Montessori Journey*:

Recommend one or both parents to complete participation within the first two years of their child’s enrollment at St. Catherine’s;

Encourage prospective parents to participate; and

Require faculty, administration and Board to complete participation *within* one year of the commencement of service in their position.

**Results Objective 6** Maintain:

- An orientation to include the New Parent Orientation DVD to St. Catherine’s that parallels *The Montessori Journey* and is offered to all parents, prospective parents, faculty, administration and Board;
- A program of seminars, workshops and speakers to further educate parents, teachers, Board members, administrators and those outside the St. Catherine’s community in the principles and implementation of Montessori;

- Results Objective 7**      • Create a process for tracking, recording, reporting and distributing the post-graduation performance of St. Catherine’s students. Make information available to current students and families, extended families and the public.

• **STRATEGIC FOCUS 2**

**Maintain and Enhance St. Catherine’s as a Model Montessori Educational Experience**

*Overview:* The smaller the organization and the greater the number of other organizations (especially larger ones) with which it competes, the greater the need for an explicit and pinpointed definition of what the organization is and how it is different from its competitors. St. Catherine’s is a unique school that wants to preserve its unique character even as it evolves and grows. To remain viable in the Greater Houston market of private schools, St. Catherine’s must make clear the reasons why it offers an educational experience equal or superior to that available at any other private school in Houston.

- Results Objective 1**      Serve the child from 14 months to age fifteen in a faith-based environment under the principles of Catholic stewardship and in accordance with the philosophy and methodology pioneered by Maria Montessori.

- Results Objective 2**      In furtherance of Results Objective 1, maintain a Toddler program that serves age 14 months to age 3-years.

- Results Objective 3**      Maintain, monitor and enhance the quality of its teaching staff, curriculum and educational resources for the purpose of preserving and developing the School’s unique spiritual, ethical and cultural environment that draws upon its Catholic foundations to honor and foster its Montessori principles.

- Results Objective 4**      Define, document and distribute appropriately the characteristics that mark or should mark St. Catherine’s as unique among all Greater Houston schools, private schools, parochial schools and Montessori schools.

- Results Objective 5**      As a critical element in St. Catherine’s uniqueness, maintain the Reading Center as a key component of St. Catherine’s;

- Continue to evaluate the Reading Center’s impact on the tutored students;

- Focus on serving the reading needs of children who are not students at St. Catherine's;
- Allow private tutors to utilize the space;
- Identify resources that can be called upon as needed by St. Catherine's faculty to support the work of the School.
- Develop a succession plan in the event of Sr. Edna Ann Hebert's retirement.

To realize the full potential of the Reading Center, faculty will develop a plan for the most effective use of the Reading Center as a resource for the School in accordance with the Montessori principles on which St. Catherine's is based.

**Results Objective 6** Increase the number of teachers certified by the Association Montessori International (AMI) on the faculty to eighty percent (80 %) by the start of the 2013 academic year through training of current faculty members and hiring of new faculty.

**Results Objective 7** Continue to evaluate AMI accreditation as a goal of the School. Define, document and distribute the benefits of AMI accreditation to the school community.

**Results Objective 8** With respect to teacher leadership:

- The School will establish means for AMI certification of existing faculty;
- The School will provide opportunities for current faculty to improve their teaching skills through attendance at professional seminars and conferences and at courses offered at Houston area universities and elsewhere; and
- The School will provide opportunities for teachers to learn best Montessori practices by site visits to other Montessori schools throughout the United States.

**Results Objective 9** Maintain student enrollment in the new facility up to 249, not including the Infant/Toddler program

- The maintenance of three primary communities with a total of 81 students and one all day primary community with a total of 27 students;

- The maintenance of two elementary communities with a total of 56 students,
- The maintenance of two upper elementary communities, with a total of fifty students,
- The maintenance of one upper school, with a total of up to thirty-five students.

**Results Objective 10** Maintain a faculty size that at a minimum keeps student-teacher ratios at levels appropriate levels for Montessori education.

**Results Objective 11** Strengthen programs in foreign languages and music.

**Results Objective 12** For all Students, maintain and develop a program of extracurricular programs, in particular athletics, comparable or superior to those offered in other private schools for the lowest possible cost to families.

Define, document and distribute appropriately the philosophy and vision of the extracurricular programs, specifically athletics.

**Results Objective 13** Institute programs and means to limit attrition in class sizes from Elementary to Upper School in accordance with enrollment goals.

**Results Objective 14** Develop and implement a partnering program with Montessori schools across the United States to work jointly on specific projects implementing Montessori in schools.

**Results Objective 15** Evaluate Student Exchange Program that brings Students from other Montessori schools to participate in the St. Catherine's educational program, while sending members of the St. Catherine's student body to other Montessori schools.

**Results Objective 16** With respect to parent leadership, the Board and administration will:

- Develop a written program of opportunities for parental involvement in the School;
- Offer each parent the opportunity of participating generally and specifically in the activities of the School;

- Develop a program of pinpointed participatory activities, encouragement and reinforcement for parents involved in the work of the School; and
- Develop a written program of opportunities for involvement by grandparents, alumni and others interested in and committed to the progress of St. Catherine's.

**Results Objective 17** Develop, document, distribute appropriately and annually review an organizational chart that makes clear the communication, reporting and accountability links among the Board, committees, administration, parents and faculty for the purpose of empowering the the School's community by:

Eliminating redundancies;

Achieving greater clarity and alignment in the operations of the School;

Working more efficiently on behalf of the children;

Minimizing conflict created by miscommunication or under communication and

Supporting a solid foundation and structure for administrative decision making.

### STRATEGIC FOCUS 3

#### Maintain and Enrich the Diversity and Richness of the St. Catherine's Community

*Overview:* A significant element in what makes St. Catherine's culture unique and its educational program effective is the diversity and richness of its student body. For St. Catherine's to maintain this diversity and richness the School must consciously work to develop an ever larger pool of applicants from all social, racial, ethnic and economic sectors of the Greater Houston region, actively promote the School to that pool of potential applicants, recruit within that pool and ensure that financial need is not a barrier for children who ought otherwise to attend St. Catherine's.

**Results Objective 1** Review current admission policies annually to assure they further the St. Catherine's mission, vision and values, and insure that those policies are well-known and readily available both to current and prospective St. Catherine's parents.

**Results Objective 2** Set tuition such that:

- Tuition generates revenues sufficient in conjunction with other revenue sources to fund the School's financial plan;
- St. Catherine's tuition is competitive with that of its peer schools; and
- Tuition at St. Catherine's falls into the mid-range of tuitions for all private schools in the Houston area.

**Results Objective 3** Endeavor to turn away no child solely for lack of financial resources or because of disability.

**Results Objective 4** Conduct a tuition survey across a representative and statistically valid sampling of Houston area private schools to develop a valid basis for comparing the all-in annual costs of an education at St. Catherine's with other Houston area schools.

**Results Objective 5** Develop an endowed Scholarship Fund as part of a larger general endowment fund that generates sufficient annual income to provide partial or total financial aid to up to 10% percent of the student body. Annually publish key statistics regarding the Scholarship Fund's financial status and scholarships awarded, both during the current academic year as well as the five preceding academic years.

**Results Objective 6**      Develop and publish policies on tuition and scholarships that further the goal of maintaining and enriching the diversity of the School's student body by establishing explicit standards for setting tuition levels, creating clear purposes and criteria for the award of scholarships and defining with workable specificity the role financial need will play in scholarship awards, tuition waivers or other tuition subsidies.

**Results Objective 7**      Enroll current parents in an ongoing program managed by a standing committee of parents and teachers to proactively identify and engage in outreach to families who should consider St. Catherine's.

## STRATEGIC FOCUS 4

### **Maintain a Physical Plant That Furthers the Mission, Vision and Values of St. Catherine's**

*Overview:* The physical plant for St. Catherine's should both embody the principles of Montessori education in its design and also facilitate the implementation of Montessori education within its confines. The physical plant provides for the School's immediate needs as well as allows some provisions for possible future growth and change. The physical plant should always allow the School to undertake activities such as school plays, athletic activities and outdoor learning.

**Results Objective 1** Assure that the physical plant always reflects Montessori principles in its design, materials and functional arrangement, That assurance to include participation of an AMI-certified faculty member on the Building and Grounds Committee.

**Results Objective 2** One of the central tenets of the Montessori philosophy is the connection between the child and the natural world around them. Plan for a safe, peaceful and beautiful outdoor environment in which Students grow in their respect for and understanding of the natural world.

- Develop, refine and build the vision of the Montessori outdoor learning environment in several phases;
- With input and contribution from our guides, staff, grounds committee and a landscape architect develop a schematic set of drawings; and
- Discuss with the community, faculty, staff and the Development Office to determine the timing of the fundraising and construction of the outdoor classroom.

## **STRATEGIC FOCUS 5**

### **Strengthen St. Catherine's Governance Structure**

*Overview:* St. Catherine's began as the dream and inspiration of two women. Their vision informed the School's creation and has largely guided it ever since. For St. Catherine's to build on their legacy, the School has been in the process of making the transition from being the creation of those two pioneering individuals to an institution reliant on no one person for its health and welfare. This transition will be especially critical in the area of School governance.

**Results Objective 1** A principal focus of St. Catherine's work on governance will be the generation of present and anticipated future Board, administrative, teaching and parental leadership to insure the organizational, spiritual and intellectual health and growth of St. Catherine's.

**Results Objective 2** With respect to the development of St. Catherine's administrative and elected and appointed leadership:

- The principal will at least annually provide the Board with an updated list of at least two (2) individuals each who would be capable of and likely willing to accept the position of principal in the event of a vacancy;
- The Board will at all times maintain a list of potential Board candidates able and likely willing to serve as Board members, such list to contain candidates qualified in one or some of the following categories: spiritual leadership, organizational expertise, legal, fundraising capacity and ability to conduct outreach; and
- Wherever practicable, the Board and principal will take advantage of opportunities and or create opportunities to work with the respective candidates on issues of interest and concern to the School for purposes of evaluating the merits of asking those individuals to accept a longer-term relationship to the School, and no person will be elected to the Board whom the Board has not had the chance to review and evaluate through the candidate's participation in at least one such opportunity.

**Results Objective 3** Maintain the current single-tiered Board structure, but review and decide on whether the current number of Board positions should maintained or expanded and, if the number is to be

expanded, by how many positions. This review and decision will be based on:

- The job description developed for the Board;

The ability at different membership levels of creating a Board that includes members meeting a reasonable number of the profiles called for in Results Objective 4 below; and

The need to maintain St. Catherine's Montessori-, Catholic- and faith-based culture.

In addition, the Board will develop a method for soliciting the names of Board candidates from all elements of the School.

#### **Results Objective 4**

Establish Board profiles for membership that at a minimum include a mix of individuals who collectively:

- Possess those skills, experience, spirituality, intellect and commitment to Montessori to provide counsel, guidance and informed judgment on the quality of the School's Montessori program;
- Have sufficient expertise and experience in management to provide counsel, guidance and informed business judgment on the organization and management of the School;
- Has potential of generating by personal contribution or the solicitation of others financial support for the School sufficient to create a reasonable endowment and provide for the long-term stability and growth of the School; and
- By virtue of their positions, cross-memberships and personal stature can increase the visibility of St. Catherine's throughout the Greater Houston community.

#### **Results Objective 5**

Develop a Board that strives to have both Catholic and non-Catholic members, is comprised of relatively equal numbers of men and women and is racially, socially and ethnically diverse in reflection of St. Catherine's Vision, Values, and Mission.

- Results Objective 6** Maintain a program of continuing education for Board members on current best Board practices, contemporary thinking on Board roles and responsibilities and on the curriculum and Montessori methods of St. Catherine's.
- Results Objective 7** Confirm and enhance the existing system of standing and ad hoc committees in order to expedite the work of St. Catherine's, by:
- Drawing committee members from both inside and outside the Board and, as advisable, from outside as well as inside the St. Catherine's community; and
- Including AMI-certified members where the committee deals with matters affecting the Montessori principles in which St. Catherine's is founded.
- Results Objective 8** For each committee, whether standing or select, the Board of Directors will adopt a job description that details the committee's purpose, its membership composition and organizational structure, its tasks for the next twelve months and the way in which it will report and be responsible to the Board.
- Results Objective 9** Adopt the strategic plan as an evergreen rolling five-year document, with annual reviews and revisions and creation each year of a new fifth year, this review process to include:
- at least one formal gathering of Board members and representatives from other School stakeholder groups, as well as
  - development of an Implementation Plan laying out detailed milestones and schedules for following up on the Strategic Plan during the next twelve months.

## **STRATEGIC FOCUS 6**

### **Enhance St. Catherine's Development Program**

*Overview:* St. Catherine's needs to enhance its development efforts in order to sustain and strengthen its ability to meet its commitment to excellence.

**Results Objective 1** For St. Catherine's, "development" will mean the generation of sufficient financial resources other than tuition and parent lead fundraising events, to insure the sustained ability of the School to provide the highest-quality Montessori education to the broadest possible spectrum of children.

**Results Objective 2** With respect to the development of financial resources:

- The development director, with the Board of Directors oversight, will develop a program of planned giving for individuals committed to St. Catherine's but who have less extensive financial resources, such planned giving to include but not necessarily be limited to recurring annual gifts and gifts made through estate planning;
- The Board will oversee the Development Office undertaking an initial environmental scan of foundations and other organizations that might be candidates to extend financial support to the School separate and apart from the Capital Campaign, and will assure that the Development Office repeats that scanning process on an annual basis; and
- The development director, with the Board of Directors oversight will develop and implement plans to approach individuals, foundations and other organizations identified as candidates to provide ongoing financial support, the goal being that within seven years ten percent (10%) of the School's recurring funds come from such sources, such percentage not to include contributions to the endowment or income from the endowment.

**Results Objective 3** Develop an organizational chart outlining the respective role and responsibilities of the Development Director, as well as the reporting relationships and accountabilities.

**Results Objective 4** To achieve the foregoing Results Objectives 1 and 2, the Board will:

- Overseer creation of job descriptions for:
  - The Development Director, such description to include qualifications and experience requirements, as well as a listing of specific responsibilities and expectations on the part of the Board;
  - The Development Office, such description to include a listing of specific responsibilities and expectations of the Board, as well as a target for fundraising equal to at least five times the annual budget provided for the Office; and
- Clarify the role and responsibilities of the School administration in development activities, including the keeping of financial records and historical information on development activities;
- Overseer creation of a chart of reporting relationships among the Development Office, the School administration and the Board; and
- Establish and regularly review and update a distribution list for summary progress reports from the Development Office.

**Results Objective 5** Include in development plans a structured approach to soliciting, managing, recording and acknowledging in-kind contributions of goods and services from parents and others as a means of leveraging the School's limited financial resources.

**Results Objective 6** Dedicated funding for the Development Office and development activities will be included in each year's budget and the Board will regularly review funds raised against monies budgeted for development to assure a reasonable and appropriate rate of return on the monies invested for development.

**Results Objective 7** Give each Board member the opportunity each year to receive training on current development issues and trends.