

PRIORITIES	STRATEGIES	KEY PERFORMANCE INDICATORS	PLANS 2016-2017	PLANS 2017-2018	PLANS 2018-2019
1 Increase retention of students and families	<i>Overall performance is measured by increased retention of students, by level, over previous year</i>				
	Maximize facilities for physical activities to facilitate growth of sports offerings <i>(Admin)</i>	Track participation in each sports offering. Measure effect on students over time (students staying/leaving)	Initiate expanded after school athletic program to include team sports for middle school, clubs for younger children and coaching assistant opportunities for high school students	Seek league membership for middle school sports. Maintain and expand current offerings for all levels	Continue efforts to address the facilities issues that limit these options
	Provide space for community gathering <i>(Admin)</i>	Measure increased presence of families on campus as a result of the community gatherings	Explore options for temporary space for community gatherings	Evaluate costs and implement any viable options	Continue to implement viable options, as needed
Evaluate transportation options <i>(BOT/Admin)</i>	Advancement office track student attrition because of transportation issues.	<ul style="list-style-type: none"> • Explore emerging public/private transportation options • Develop a handout on transportation options (vanpool/ carpool/bus) 	Continue to provide handouts, monitor student use of alternative transportation and monitor attrition due to lack of transportation	Continue to provide handouts, monitor student use of alternative transportation and monitor attrition due to lack of transportation	

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	Expand programs for students and add relevant programs (<i>Secondary Program</i>)	Measured by number of new programs and input from students on how this impacted their school experience.	<ul style="list-style-type: none"> Identify program enhancements in early fall, to facilitate advance planning for the following year. Promote these enhancements to build anticipation and as an incentive to stay at WMS Open Innovation and Design Lab using 2015–2016 Auction Funds	Continue to research, evaluate and expand new programs, analyzing impact of each change. Expand ID Lab offerings and include in curriculum	Continue to research, evaluate and expand offerings Evaluate/expand ID Lab
	Increase parental engagement; improving outreach to new families; increasing volunteerism; and by expanding the awareness and understanding of Montessori (<i>Admin/Advancement</i>)	Track over time family participation in parent engagement programs, fundraising, volunteerism and retention	Implement new software to facilitate parent volunteer opportunities	Evaluate and support	Evaluate and support
			Collect testimonials and positive stories of academic achievement, from kids and parents and external parties	Collect new stories	Collect new stories

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	<i>Increase parental engagement (continued)</i>		<p>Host community education events/ donate space for events consistent with our values to raise WMS profile in community</p> <p>Expand parent education offerings such as Parent Toddler program and online “Understanding Montessori” course</p>	<p>Evaluate for success</p> <p>Evaluate/Continue</p>	<p>Evaluate for success</p> <p>Evaluate/Continue</p>
<p>2 Expand WMHS (secondary program)</p>	<p>Increase awareness of our secondary program through more and better marketing <i>(Advancement/ Secondary)</i></p>	<p>Increase the number of student inquiries, visits and enrollments coming from outside the school</p>	<p>Develop relationships with corporate relocation specialists and feeder schools</p>	<p>Continue to foster relationships</p>	<p>Evaluate the effort/ result</p>
			<p>Participate in education events in the area, to develop reputation as thought leaders</p> <p>Review and improve marketing materials</p>	<p>Participate in education events in the area, to develop reputation as thought leaders</p> <p>Evaluate the impact of materials; revise if necessary</p>	<p>Evaluate the strategy for success</p> <p>Continue to innovate and change with the needs of population</p>

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	<p><i>Increase awareness (continued)</i></p>		<p>Invite people to school to view Aquaponics and other unique programs</p> <p>Students volunteer in community projects and activities</p> <p>Research recruiting international students and associated costs</p> <p>Prepare testimonials for website and recruiting materials that demonstrate how Montessori better prepares students for college and life</p> <p>Provide information to parents about the value of WMS Secondary in providing a healthy, happy middle school experience, and emphasize differences in academic and social experiences</p>	<p>Evaluate the impact</p> <p>Continue to support key programs that reflect WMHS values</p> <p>Implement recruiting measures, if warranted</p> <p>Include testimonials in website/recruiting materials</p> <p>Continue to provide information to parents of UEL students about value of WMS secondary</p>	<p>Evaluate the impact</p> <p>Continue to support key programs that reflect WMHS values</p> <p>Evaluate strategy</p> <p>Evaluate strategy</p> <p>Continue strategy</p>

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	Expand high school program options and Capstone experiences <i>(Secondary)</i>	Students report a fulfilling high school experience	<ul style="list-style-type: none"> • Offer more course and elective options • Identify trip and course options in the fall before enrollment for the following year • Connect students with external high school programs 	<ul style="list-style-type: none"> • Carry current middle school sports into high school • Expand high school sports options • Add additional clubs and after school activities • Expand foreign language offerings 	
			Research ways to incorporate online learning to supplement academic offerings	Implement various options	Implement various options
	Develop external social connections <i>(Secondary)</i>	Track participation and number of offerings	Connect with other small private high schools for social events, and service projects		
	Offer unique programs and experiences not available at other schools <i>(Advancement/ Secondary)</i>	Measure number of visits by external secondary groups Measure student satisfaction with unique offerings	<ul style="list-style-type: none"> • Aquaponics • Montessori Model UN • Continue to maintain accreditation • Communicate status as only Montessori High School in the PNW 	Offer unique science electives, utilizing available lab space	Review programs offered and adjust based on needs and enrollment

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	<i>Offer unique programs (continued)</i>		Leadership diversity program at NWAIS	Continue to increase offerings based on budget and interest of students	
3 Plan and Fund Facilities Improvements	Determine the scope of the next phase with intention that space will generate income according to the Master Plan (BOT)	Next phase planning complete by 2019	<ul style="list-style-type: none"> • Create BOT planning subcommittee • Estimate capital campaign earnings for project scope • Develop high level timeline 	<ul style="list-style-type: none"> • Initiate planning phase • Begin to develop capital campaign / Discuss at BOT and gain BOT approval • Establish preliminary costs, compare to fundraising capability 	<ul style="list-style-type: none"> • Finalize planning • Launch capital campaign
	Design a Capital Campaign model to maximize giving (<i>Advancement</i>)	<p>Track % of families participating</p> <p>Track average, median \$ given per family</p> <p>Families understand and identify with the stated needs</p>	<p>Develop relationships with large granting organizations</p> <p>Develop a concrete plan that is clear and understandable to families</p>	<p>Inform granting orgs of timeline</p> <p>Develop plan for capital campaign, based on plans for next phase in the Master Plan</p> <p>Begin messaging to key donors</p>	<p>Launch Capital Campaign/Apply for grants</p> <p>Begin CC messaging to key donors Provide naming opportunities for donors</p> <p>Messaging to school and broader community</p>

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	<i>Design a Capital Campaign model (continued)</i>	CC goals are fulfilled	Develop relationships with families/donor software	Continue maintain and expand system/relationships Donor wealth screen	Continue to update system and maintain and expand relationships
	Find/Develop grant sources <i>(Advancement)</i>	Increase volume of grant \$ into school	Apply to 3-5 granting orgs to develop awareness of WMS	Apply to relevant granting orgs and continue to manage existing relationships	Apply to relevant granting orgs
	Create a model to maximize revenues from facilities <i>(BOT)</i>	Both businesses (WMS and facility management arm) operate successfully and are financially complimentary. Profits from facility management are used to increase school stability and/or improve facilities available to the school	BOT purposely designates beneficiary of facilities profits	BOT purposely designates beneficiary of facilities profits	BOT purposely designates beneficiary of facilities profits
		Track number of facilities improvements made through leasing profits.	Research vendor partnerships which generate income for WMS	Implement any vendor partnerships with mission fit	Evaluation of partnership and review of other possible models
	Evaluate tuition and fee structure on annual basis <i>(BOT)</i>	Increase funding for facilities w/o impacting other fund raising.	Investigate Building assessment fees	Make decision for adding assessment fees in 2018-19 tuition	If positive decision, adding assessment fees to 2018-19 tuition

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4 Advance the financial stability and sustainability of WMS	Increase PPRRSM to 5% of Operating Expenses and Operating (OP) Reserves to 15% of OP Expenses, while maintaining a Current Ratio of 1.0 <i>(BOT/Admin)</i>	<ul style="list-style-type: none"> Track the OP Reserves relative to the OP Expenses Track the PPRRSM Track the ratio of Current Assets to Current Liabilities 	<ul style="list-style-type: none"> 2.9% of operating expenses to PPRRSM 7.5% of operating expenses to OP Reserves 	<ul style="list-style-type: none"> 4% of operating expenses to PPRRSM 8.4% of operating expenses to OP Reserves 	<ul style="list-style-type: none"> 4.4% of operating expenses to PPRRSM 8.6% of operating expenses to OP Reserves
	Ensure our property management business is profitable <i>(BOT/Admin)</i>	<ul style="list-style-type: none"> Profitability of leased property Increase assets from school operations 	Create financial reporting model that clearly reports net revenues separately for school and property operations	Monitor results and evaluate the business model to see if further change is necessary	Continue to monitor and evaluate model
5 Develop strategies for an increasingly diverse group of families to actively participate in the WMS community and take on school leadership roles	Increase the percentage of students receiving tuition assistance Based on historical: 2014–15: 13% 2015–16: 17% 2016–17: 17% <i>(Admin/BOT)</i>	Increased number of families applying for and receiving tuition assistance	Increase messaging regarding tuition assistance Review applications and make awards based on strategy	Review 2017–18 awards for effectiveness of messaging Review applications and make awards based on strategy	Continue with strategy, if working, or reassess

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	<p>Increase tuition assistance as a percentage of gross revenues</p> <p>Based on historical: 2014–15: 8.6% 2015–16: 9.0% 2016–17: 9.74% <i>(Admin/BOT)</i></p>	<p>Increased tuition assistance as a % of gross revenues</p>	<p>Incorporate net tuition revenue model when evaluating tuition assistance applications</p>	<p>Long Range Financial Planning goal for 2017–18: 10.2%</p>	<p>Plan increase of .5 – 1.0% depending on financial results of 2017–18</p>
	<p>Provide financial aid for electives, trips and before/after school care <i>(Admin/BOT)</i></p>	<p>Assistance is given for electives, trips and before/after school care.</p>	<p>Research funding needs and strategy for providing assistance</p>	<p>Implement strategy</p>	<p>Evaluate strategy</p>
	<p>Ensure that faculty understand the importance and value of diversity in the curriculum and can communicate to students and families <i>(Admin)</i></p>	<ul style="list-style-type: none"> • Assess level of understanding through student population's ability to identify/ articulate issues and act on beliefs/respect for others • Monitor number of programs offered annually 	<ul style="list-style-type: none"> • Anti-bias curriculum and multicultural competencies to be added to the curriculum map • Task force to systematize curriculum 	<p>Continue to evaluate and revise curriculum based on success of programs</p>	<p>Continue to evaluate and revise curriculum based on success of programs</p>

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	Increase diversity at the school leadership and volunteer leadership levels (Admin/BOT)	Increased diversity at school and volunteer leadership levels	Develop plan to increase participation from diverse groups	Implement plan and evaluate	Continue or revise the plan
	Increase cultural inclusion	<ul style="list-style-type: none"> • Number of cultural programs • Number of new families volunteering 	<ul style="list-style-type: none"> • Improve outreach to new and existing families (through volunteer and school community opportunities) • Curriculum includes wide, cross-cultural learning 	Continue to find opportunities to engage new families	