



2023-2026 STRATEGIC PLAN

☰ UMSI Strategic Plan Final Draft 2023

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Overview

United Montessori Schools of Indiana was founded in 2008 by a group of teachers that were interested in bringing Montessorians from across the state together to form a united voice. There had long been a need for a statewide organization that would bring together teachers, assistants, administrators and parents that represent all sectors of Montessori education in the state.

UMSI first held a statewide conference in October of 2008, which brought over 170 attendees together. It was quite a success story for an organization that only a few months earlier had been only an idea. Montessori teachers from five states attended that first conference and continue to attend each year. UMSI has grown to include 38 member schools and 24 individual members. We offer three annual professional development opportunities including a summer four-day training covering the fundamentals of Montessori, a summer social justice book club, and the annual fall conference. In addition, we have the most extensive school validation program in the country, validating Infant/Toddler through Upper Elementary programs. Our legislative advocacy committee has worked to strengthen Montessori programs in the state with wins such as recognition of certification as a path to teacher licensure, recognition of the credential by FSSA as equivalent to a bachelor degree in early childhood education when paired with any bachelor's degree, and higher teacher:student ratios for validated Montessori multi-age classrooms.

Covid and funding had a significant impact on UMSI in the last several years, resulting in the loss of our Executive Director staff position and decreased attendance at professional development offerings. This strategic plan focuses on rebuilding UMSI financially to its full capacity, and achieving our potential to be a financially sustainable organization offering vital professional development and advocacy for the Montessori community in the state of Indiana.

Mission Statement

With integrity, United Montessori Schools of Indiana fosters a community that supports, unifies, and advocates for the advancement of Montessori education.

Vision Statement

A better world through the availability of high-fidelity Montessori education for all children.

Core Values

- Integrity
- Inclusiveness
- Supportive Community
- Life-long learning
- Respect
- Social Justice

- Montessori pedagogy (guides decisions)
- Transparency

Introduction

The previous three-year strategic plan, completed in consultation with IYI, has expired. Many goals, such as creating a board manual and board term rotations, were completed. The last strategic planning cycle focused on issues of organizational structure, with projects based on board roles, practices, and policies.

The board manual has provided a road map for the goals listed in the previous strategic plan, and much progress has been made. While the systems at the committee level continue to be refined, and board manual practices are still being habitualized, these systems are in place.

This strategic plan focuses on financial sustainability for the organization, and the omnipresent goal of hiring another Executive Director. Surveys of board and committee members, done in committee, and a consultation session with Kim Davidson of Oak Farm Montessori and the Executive Committee, yielded fairly consistent results from all members. The majority of respondents reported that they feel their committees are accomplishing necessary tasks, but not in a way that feels sustainable or consistent. Funding and human capital were the repetitive concerns across surveys. This strategic plan is laid out to first address funding, which then allows for the re-hiring of an Executive Director, which will in turn alleviate the strain on time and energy resources the current board and committee members are experiencing.

Therefore, this strategic plan includes four strategic initiatives, laid out in a cause-and-effect order. Strategic Initiative 1 is building membership, which increases the audience for our Strategic Initiative 2, professional development that acts as our source of income. Building the financial potential and sustainability of our professional development programs will hopefully attract additional funders and lead us to Strategic Initiative 3, financial sustainability. These are the pillars upon which our ability to hire a new Executive Director (Strategic Initiative 4) rest, and thus the alleviation of some of the expectations on board time and energy. Once an executive director is in place, we can refocus on growth in areas such as committees and new initiatives.

Strategic Initiative 1-Building Membership

SWOT Analyses

- Strengths- We have added some memberships
- Weaknesses-(capacity) time and energy required to build these relationships
- Opportunities- six month free membership window; “pushing” social media posts; student rates for adult learners (Trine partnership); a few new schools; pausing two committees allows for extra help on membership committee; Trine will send some mass emails for us (collecting info, offering free membership, etc.)
- Threats-haven’t billed since 2021-loss of trust? Some schools have closed during Covid; limited benefits

Objectives

- More member schools
- More individual members
- Systems such as a committee manual/calendar or committee roles; for example, how membership renewal processes will be formalized
- Attract new membership to committees and the board

Projects

- Census update (potential audience/membership)
 - Performance Indicators: Completion of census through surveys and research by January 2024
 - Project Leaders: Governance Committee
- Membership survey to optimize design of membership benefits
 - Performance Indicators:
- Outreach to Indiana Montessori schools about advocacy, PD, validation, and membership
 - Performance indicators: 2-3 person media team, expand audience
- Evaluate possibility of calling the lapse in renewals “free six month membership for everyone”
 - Cons: Membership discounts would need factored in to fundamentals; 6 months behind on UMSI income
 - Pros: would increase our contact database and engage new people; expiration right before the fall conference would encourage renewal for member discounts on registration
 - Performance Indicators: discuss and discard or implement by May
- Provide more networking opportunities in various regions (examples: Montessori and Martinis, book club, etc.)

Strategic Initiative 2-Optimizing Professional Development Offerings

SWOT Analyses

- Strengths-Trine University conference sponsorship
- Weaknesses-Google drive needs cleaned up/organized
- Opportunities-Connections to people outside our state now that the conference is at Trine and close to other locals; collaborations and mutual support of other organizations (such as AIMS)
- Threats- AMS regional events, lack of volunteers/capacity

Objectives

- Increase conference and fundamentals attendance
- Increase conference sponsorship

Projects

- Increase marketing to attendees and sponsors
 - Performance Indicators-more attendees and sponsors (more than \$1000 higher income)
- Complete the PD Committee manual, including timelines for completion of event preparations and creation of roles/task teams within the committee
 - Performance Indicators-manual completion
- Research what other states/organizations do for events
 - Performance Indicators-recommendations included in next strategic planning process (and kept in the manual for posterity)

Strategic Initiative 3-Achieving Financial Sustainability

SWOT Analyses

- Strengths- Kim Davidson support; currently “in the black”; strategic reprioritization; a board willing to step in and fill ED shoes until one can be hired (dedication)
- Weaknesses-no operating budget; dependency on grant funding
- Opportunities-Clearer understanding of all our revenues and expenses being able to predict/budget for upcoming fiscal year; template and intention for operating budget; build our portfolio and approach other grant funders
- Threats-Dekko stepping back from funding; human capacity/retention within organization; no executive director (or self-sustaining funding for one)

Objectives

- Profitable professional development offerings
- Increased multi-year grant relationships from a variety of funding sources
- Annual organization sponsorships

Projects

- Create sponsorship/underwriting menu and seek sponsorships
- Spend 6 months building the organization (strategic initiatives 1-3), then make requests to funders
- Define goals of the finance committee, roles within the committee, and begin to create a manual

- Develop working budget that will be shared and updated (projected vs. actual) at each meeting
 - Committees will need to submit their budget proposals to aid in creation of operating budget
 - After the budget is approved, this will empower the committees to make more decisions without asking the board
 - Set spending limit that requires board approval

Performance Indicators

- Committee budget proposals to May meeting
- Creation of operating budget by July and inclusion of actual vs. projected at each board meeting starting September

Strategic Initiative 4-Further Growth with an Executive Director

SWOT Analyses

- Strengths-Knowledge from having an ED before and have learned from that experience
- Weaknesses-Uncertainty of continuous funding (year to year)
- Opportunities-Freed up board capacity with an ED; increased exposure of UMSI (regional); set up a strong system for record keeping (to aid in ED succession planning)
- Threats-over-dependence on ED (irreplaceable or traumatic for organization if they leave); no succession planning in place

Objectives

- Continue to grow non-financial committees and programs, such as the Advocacy Committee and Validation Committee
- Begin to plan new initiatives and innovations
- Expand marketing, reach, and connections
- Look toward the future as a financially sustainable organization with clear roles and support for continued health and growth by future volunteers

Projects

- Increase board diversity through strategic nominations/approvals (gender, geographic region, private/public, roles, skill sets, demographics, etc.)
- Building connection to lawmakers
- Building and formalizing relationships with AMS, AMI/USA, MPPI, etc.
- Succession planning
- Update board manual with links to committee manuals and defined roles within committees

Committee Growth

- **Validation committee** is currently in strong standing, feeling they are meeting or exceeding the required tasks of the committee.
 - Future goals for growth include:
 - As the board connects to Indiana schools, there may come an influx of schools wanting to be validated. The challenge will be in recruiting and training a robust group of verifiers from around the state.
 - Adding an Infant/Toddler committee member
 - Verifying an I/T program
 - Collaborating with the advocacy committee on waiver request packages for Montessori schools
 - Creating new marketing materials
 - Creating scripts for school connection meetings
 - Evaluate potentially giving verifiers additional PD discounts
 - Advertisement of program at events
 - Gather testimonials from validated schools and verifiers
- Advocacy Committee will become more proactive (vs reactive)
 - Applying for more organizations, think tanks, etc.

Increased Marketing/Social Media Presence

- Use of Google Analytics to target and optimize marketing and communications

Operations Plan

- Until the hiring of an Executive Director, extra duties will be covered as follows
 - Administrative needs such as checking email, answering general inquiries, forwarding messages to necessary committees/members, organizing files, managing the Asana account, managing the calendar, etc. will be completed by the President
 - Website updates will be completed by a Board Member, currently Teresa Heaverin
 - Social Media and Communications will be completed by a Board member, currently Katie Gerdt
 - It will be vital that each committee chair manage the administrative needs of their committees, such as scheduling meetings, taking minutes, adding summaries and reporting at board meetings, following up on tasks within the committee by set deadlines, and using Asana to track tasks

Summary

UMSI will spend at least the next year and a half focusing on financial sustainability. Advocacy and Validation (non-financial committees) will still complete work as needed to maintain committees, and will look toward growth once an Executive Director is hired. This will be a

building phase for UMSI in terms of audience, connection with individuals and schools, membership, event growth, and funding growth.

These efforts will enable us to hire an Executive Director, which will expand our goals and begin a phase of growth and innovation throughout UMSI in the future.