

CASTLE ISLAND

BILINGUAL MONTESSORI

INNOVATIVE. INTERCULTURAL. INCLUSIVE.

- A JOYFUL LEARNING COMMUNITY SINCE 2012 -

English & Spanish Immersion | Independent Elementary School | Excellence in Education for Children Ages 3 - 13

Strategic Plan 2025

Submitted to the School Community
By
Board of Trustees
January 2025

GOALS 2024 Update Summary

Goals and their objectives are set and evaluated annually from November through November. The objectives denoted with an asterisk were created based directly on the AMS site visit team's recommendations for the 2022 accreditation report. The following are goals that were set at the annual strategic planning meeting in November 2022 with a five-year deadline of November 2027. Actions taken during this past year and continue to be attended to are described here:

Goal 1: Invigorate Interest in BoT Membership

Objective A: Implement an Annual Documents and Policies Review

Accreditation Committee has established an annual calendar for reviewing, updating and publishing school policies, protocols and practices.

Objective B*: Look to new ways to invigorate interest in BoT membership and that it prepare a strategic succession plan for future board leadership

Two candidates became board members in 2024 bringing professional experience, one as an attorney and one as an K-12 math educator. The Board Membership committee continues to pursue new board candidates to provide diversity and professional expertise to the leadership team; and, plan to begin a succession plan for future board officer positions.

Goal 2: Institutional Development to Meet Mission & Revisit Vision

Objective A: Outdoor Classroom Completed on Earth Day April 22, 2024; vegetable garden dedicated to Founding President, Ed Nickerson on International Peace Day, September 21, 2024; mural painted by parent and muralist, Ramiro Dávila-Comas funded through a collaboration with community partners, Albany Center Gallery and El Loco Restaurant; and, regular use by children and their guides since September 2024.

Objective B: Growth and Expansion: 8th Grade, Augmented Admin Team, Facilities temporary, transitional, and permanent - Committee formed, November 2023; Exploratory research into financing and available properties, December 2023 Established a new five-day per week morning Toddler program; three lead guides enrolled at Montessori teacher education programs for training at the level that each teaches; established partnership with a sister school in Costa Rica for meaningful and personalized learning via video conferences with a class at a Montessori school there; and, relocated the elementary program to a larger classroom, adding a reading loft as well as installing aesthetically pleasing storage cabinets to each classroom. The Facilities Committee continues to search for a viable location to relocate to for including additional classrooms and enrollment for toddler through adolescence. A parent focus group was established in June 2024 to complete a school assessment survey and the results of the school's strengths and areas for improvement published in March 2025, with a follow-up to poll parents for the top three priority improvements to be made as soon as possible. A Diversity Statement was created and, at the November 2024 strategic planning meeting, was approved by the Board of Trustees.

Goal 3: Creation of a Five-Year Financial Model

Objective A*: Creation of a 3-5 year financial model that includes scenarios for low, medium, and high rates of enrollment including space capacity analysis for each enrollment scenario. The ability to provide necessary human resources for the school's operations depends on this strategic financial modeling information. The Finance Committee has continued to refine income scenarios based on enrollment and tuition, planning for budgeted expenses.

Objective B: Tuition increase for 2023-4 and Tuition Increase Structure to be implemented 2024-5 At the November strategic planning meeting, the Board of Trustees approved a modification of the school's existing model for income-based sliding-scale tuition increasing the income cap from \$150,000/yr to \$200,000/yr, and the sibling discount from first child 10% discount, additional children 15% to first child 20%, second child 40%, additional children 20% discount, including for the Toddler Program, for families to apply for scholarships and discounts in January 2025 for the 2025-2026 Academic Year. Additional discounts were approved and offered for returning students and for families who make a three-year enrollment commitment.

Objective C*: Continue to explore financial avenues [beyond tuition] to bring teacher and admin salaries to the level that will support longevity of employment for this talented team. The school has partnered for local foundation, Business for Good, and has planned a fundraising gala to be held on June 5, 2025 at Hattie's Restaurant in Albany, with a goal of raising \$125,000 for expansion of our programs. Sponsorships and in-kind donations have been received from community partners such as: Honest Weight Food Co-op, Nine Pin Cider, Albany Center Gallery, El Loco Restaurant, Stewart's Shops, and others. The school was awarded a grant in December 2024 from the federal employee retention tax credit for having retained most of the staff during the pandemic years, 2020-2022.

Goal 4: Provide Necessary Human Resources & Increase Salaries to Support Longevity

Objective A: Director Evaluation - The Accreditation Committee has selected an evaluation tool and have started the process for the evaluation to be completed by June 2025.

Objective B*: Implement Salary Structure with Budgeted 5-Year Increases to continue to explore financial avenues to bring teacher and administrative salaries to the level that will support longevity of employment for this talented team. The Finance Committee approved a longevity increase for staff who have been employed by the school for every five year period, and continued the 3% increase per year, as well as the salary structure provided credits for Montessori credentials, NYS certifications, higher education degrees, and years of Montessori teacher experience. Additionally, the school continues to provide 50% reimbursement for guides matriculated in a Montessori education program to further their training.

Objectives C & D: Develop & Implement Salary Perks to continue to explore financial avenues to bring teacher and administrative salaries to the level that will support longevity of employment for this talented team. *AMS Recommendation*; and, **Explore possibilities for Health Insurance and Investments** The Executive Committee have ensured that the staff have access to perks including access to Redburn's tenant amenities, and provide gift cards twice yearly as well as sponsored lunches throughout the year; and, will continue to explore access for securing benefits including health & life insurance and retirement investments.

Goal 5: Learning Outcomes Benchmarks for Each Level

Objective A*: Establish benchmarks of anticipated outcomes and competencies for each level so that teachers and parents will be clear about outcome expectations from the EC, LE, and UE programs - Montessori credentialed consultants provide ongoing informal assessments of the programs' curricula and instruction in preparation for initial implementation of leveled benchmark assessments as a tool for refining curriculum and instruction for individual children from Toddler through Elementary. The Accreditation Committee is developing a schedule for staff training to design and implement benchmarks from 2026 through 2029.

***AMS recommendation**

GOALS 2025

The following five goals are aligned with the American Montessori Society (AMS) Standards for School Improvement. Every goal also falls under the umbrella of Standard 1: Student-Centered and guided by the Montessori philosophy, mission and vision:

AMS Standard 1: Philosophy, Mission, and Vision

The quality Montessori school's mission and vision are student-centered and guided by Montessori philosophy. The school establishes and communicates a shared philosophy that informs all facets of the school's culture, daily operations, and instructional decisions

Goals

1. Invigorate BoT Membership & Structure
2. Institutional Development to Meet Mission
3. Creation of a Five-Year Financial Model
4. Provide Necessary Human Resources & Increase Salaries to Support Longevity
5. Learning Outcomes Benchmarks for Each Level

GOAL 1 Invigorate BoT Membership & Structure

Standard 2: Governance, Leadership, and Continuous Improvement (Strategic Plan)

The quality Montessori school promotes student learning and school effectiveness through strong governance and leadership that are aligned with the school's mission and vision. It establishes, implements, monitors, and refines a strategic planning process to demonstrate continuous improvement.

and

Standard 8: Records, Resources, and Support Systems

The quality Montessori school has appropriate documentation, training, and human resources to meet applicable federal, state, and local regulations, assure health and safety of faculty/staff and students, and enable all students to achieve expectations for student learning

A. Implement an Annual Review Documents and Policies

- o Board of Trustees Bylaws
- o Staff Handbook
 - Job Descriptions
 - New & Revised Policies
- o Family Handbook
 - Tuition Policy
 - New & Revised Policies
- o The Website
 - Curriculum
 - Tuition Investment

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Executive Committee, plus Yvette

Financial implications:

Legal review fees, if needed

B. Look to new ways to invigorate interest in BoT membership and prepare a strategic succession plan for future board leadership.

AMS recommendation

- o Attracting prospective BoT candidates on vision/name recognition
- o Creation of succession term “guidelines” or limits of officers, as well as implement a term rotation to mentor and train incoming officers

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Diversity/Accreditation/Membership Committee

Financial implications:

Directors & Officers Insurance Fees

GOAL 2 Institutional Development to Meet Mission

AMS Standard 3: Teaching and Learning (Educational Nature)

A quality Montessori school implements a Montessori curriculum based on clear and measurable learner outcomes. Students actively engage in the learning process, exhibit joy in learning, and apply their knowledge and skills to real-world situations.

and

AMS Standard 6: Facility Resources

The quality Montessori school provides facilities, sites, and equipment that meet optimum health and safety standards conducive to a safe learning environment in alignment with the mission of the school.

and

AMS Standard 9: Stakeholder Communication and Relationships

The quality Montessori school fosters effective communications and relationships with and among its stakeholders.

A. Outdoor Classroom – Phase 1 \$6800 net raised of our \$6800 matching grant; Phase 2 budget and financing

- o Source materials, furniture, beds, etc
 - Work Day for installation
- o Fundraiser for garden materials, converting asphalt, etc
 - Restaurant fundraiser i.e. Blaze, Bare, etc.
 - Use our existing resources for activity series
 - i.e. community led “wellness workshops”
 - o Keara - adult health; Jen - pet health; Diane - Spanish led resources for children’s health, music for health, etc

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Finance, Facilities, and Fundraising Committee

Financial implications:

Estimates (on file)

B. Growth and Expansion: 8th Grade, Augmented Admin Team, Facilities temporary, transitional, and permanent

- **TEACHING STAFF:**
 - Prepare for and recruit trained upper elementary teacher
 - Engage staff with NYSMA professional development offerings
 - Hire Upper Elementary & Adolescent Teachers
- **STUDENTS:** Enroll 52 - 65 students in Early Childhood and Elementary for the upcoming school year, with an average tuition of \$9550/student
- **SCHOOL PARTNERSHIP:** Establish partnership with 'sister school' in Costa Rica or Puerto Rico
 - Submit petition to NYSED Board of Regents for Absolute Charter, with possible charter amendment by February 2025
- **PROGRAMS:**
 - Develop surveys for programs beyond academics, including: parent-toddler program, camps, Parents' Night Out, etc.

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Administration and Diversity, Accreditation, Board Membership Committee

- **ADMIN:** Budget for Full Time Administrative Coordinator
 - Hire a new Communications/Outreach/Grant Coordinator
- **MARKETING:** Increase investment for Enrollment, Donors & Hiring
- **FACILITIES:** Develop Facilities Growth Plan:
 - 2 year goal – upgrades
 - 5 year goal – stay or move
 - Possible locations: 52 James St, other?
 - 10 year goal - Add'l space for more classrooms to enable enrollment growth

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Administration and Finance, Facilities, and Fundraising Committee

Financial implications:

Based on income from enrollment growth and possible external funding sources from grants; expenses related to expansion (overhead, furniture, supplies)

GOAL 3 - Creation of a Five-Year Financial Model

AMS Standard 7: Finances and Stability

The quality Montessori school maintains strong and prudent financial management practices and adequate fiscal resources to support its mission and vision.

A. Creation of a 3-5 year financial model that includes scenarios for low, medium, and high rates of enrollment including space capacity analysis for each enrollment scenario. The ability to provide necessary human resources for the school's operations depends on this strategic financial modeling information.

AMS recommendation

- o 5 year budget plan (implement)
 - Low – review tuition/sliding scale.
 - Medium – marketing to achieve, grants (hire pro).
 - High – expansion, grants (hire pro)
- o Eliminate Debt
 - Finance Committee will develop a schedule to determine specific annual percentage goals for debt reduction to gauge progress with respect to our aims to reduce the school debt.
- o Maintain at least 33% of our annual budget in a contingency account
 - As soon as income exceeds expenses, Finance Committee will establish a schedule for specific annual goals for this savings structure.

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Finance, Facilities, and Fundraising Committee

Financial implications:

Based on Budget Development

B. Tuition Increase Structure Review:

- o Review/revision of sliding scale amounts including income cap
 - Review current distribution along scale
 - Review cap/floor (from \$100k through 2022 to \$125k/\$4.5k)
- o Consider additional tuition increase
- o Develop multi-year structure

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Finance, Facilities, and Fundraising Committee, including Sara

Financial implications:

Based on Budget Development

C. Continue to explore financial avenues [beyond tuition] to bring teacher and admin salaries to the level that will support longevity of employment for this talented team. *AMS recommendation*

- o GRANTS & DONATIONS: Obtain grant funding and donated contributions
- o INDEPENDENT “FRIENDS OF ...”: Establish an independent fundraising organization – possibly the Board of Advisors - with assistance of a consultant
- o ANNUAL EVENTS & CAMPAIGNS:
 - Events: Fall Fiesta, Founders’ Day Dinner, *Feria de Español*, Walk-a-Thon, etc
 - Campaigns: End-of-Year/Giving Tuesday
 - “5 Points of Contact”
 - o Strategic Plan Report
 - o June Report Card (accomplishments)
 - o September Back-to-School (new purchases/additions)
 - o End-of-Year/Giving Tuesday (Holiday letter)
 - o Thank you letter/IRS Receipt
 - Outdoor Classroom sponsors & dedication

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Finance, Facilities, and Fundraising Committee, including Sara

Financial implications:

Based on Budget Development; Fundraiser, including contributions from Sponsors

GOAL 4 Provide Necessary Human Resources & Increase Salaries to Support Longevity

AMS Standard 5: Personnel

The quality Montessori school has policies and practices in place to ensure that employees are well qualified and are assigned professional responsibilities based on their qualifications (i.e., professional preparation, ability, knowledge, and experience). Employees are provided support through ongoing evaluation and professional development and are sufficient in number to support the school's mission and vision. The school states and follows fair, ethical, and non-discriminatory employment practices.

A. Director Evaluation

- Assign to committee
- Find way to survey staff w/o trepidation i.e. comment box, no typed, anonymous location
- Formalize process and put in document

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Executive Committee

Financial implications:

None

B. Develop & Implement Salary Perks to continue to explore financial avenues to bring teacher and administrative salaries to the level that will support longevity of employment for this talented team. *AMS Recommendation* - Detailed addendum included with annual contract

- Sponsored Lunches
- Complimentary Professional Development Books
- Access to Redburn Amenities
- Others

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Executive Committee

Financial implications:

Donation Based

C. Explore possibilities for Health Insurance and Investments

- Capital Region Chamber of Commerce Membership
- 401k & Life Insurance

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Executive Committee

Financial implications:

Based on Budget Development

GOAL 5 Learning Outcomes Benchmarks by Level

AMS Standard 4: Documenting and Using Results (Learner Outcomes)

The quality Montessori school enacts an ongoing assessment system that monitors and documents learner outcomes and uses these results to improve educational effectiveness.

A. Establish benchmarks of anticipated outcomes and competencies for each level so that teachers and parents will be clear about outcome expectations from the EC, LE, and UE programs *AMS recommendation*

- o Criteria to include: AMS/NAIS & NYSAIS/NYSED Common Core & Next Gen/Spanish
- o Draw from sample Assessments from other schools & NCMPS (National Center for Montessori in the Public Sector)

Person(s)/role(s) responsible for achieving the goal and/or assessing work toward the goal:

Diversity/Accreditation/Membership Committee

Financial implications:

Budget & Funding for Staff to be Paid for Work

Addendum

Castle Island Mission *Approved by the New York State Education Department (NYSED) as a nonprofit independent elementary school, 2012*

Castle Island provides world-class and accessible education fully immersed in English and Spanish in a fully implemented Montessori learning environment for children of the Capital Region of New York.

Vision 2012-2022 *Adopted by the Castle Island Board of Trustees, 2012*

We inspire learning by honoring each child's potential in a world-class learning environment designed to foster curiosity, collaboration, and innovation. Immersion in a bilingual, diverse Montessori school will offer our students the unique challenges and opportunities to become creators of solutions and leaders of a technologically advanced, environmentally vital, peaceful global community.

AMS Accreditation Site Visit Report

Submitted by the Visiting Team, April 2022

Major Commendations

The AMS Accreditation On-site Visiting Team commends the school for . . .

- The very thorough preparation of its self-study, in which broad participation from the community was invited and welcomed.
- Its decision to deliberately locate in a region of the city that is accessible to a broad and diverse community and that is also developing and growing, thereby making possible the mission-related growth of the school.
- Its deep dedication to the implementation of its mission. The mission is expressed in all aspects of school and classroom life and visibly embraced by all staff.
- Implementing its mission as a bilingual (Spanish-English) immersion model of Montessori education with a high level of integrity.
- Implementing Montessori-style leadership in which the staff is empowered to participate in decision making.
- Its leadership team in developing a coherent strategic plan designed to move the school forward, and for outlining specific steps to achieve that plan.
- The aggressive accomplishment of two of its major strategic goals, those of completion and submission of its accreditation self-study and relocation to a new and more mission-supportive location.
- Its decision to deliberately locate in a region of the city that is accessible to a broad and diverse community and that is also developing and growing, thereby making possible the mission-related growth of the school.

- Undertaking a mid-school year move into new quarters and preparing beautiful and orderly learning environments for the children within a few weeks' time, particularly the classroom teachers
- Creating and implementing a sliding scale tuition plan, thereby helping to ensure the inclusion of a range of families from various socio-economic backgrounds.
- Developing a thorough Resource Directory documenting professional support services beyond the school for families that may need them.

Major Recommendations

The AMS Accreditation On-site Visiting Team recommends that the school . . .

- Follow through immediately with its plans to provide leadership of the elementary classroom by a fully credentialed Montessori teacher.
- Engage in the creation of a 3–5-year financial model that includes scenarios for low, medium, and high rates of enrollment including space capacity analysis for each enrollment scenario. The ability to provide necessary human resources for the school's operations depends on this strategic financial modeling information.
- Continue to explore financial avenues to bring teacher and administrative salaries to the level that will support longevity of employment for this talented team.
- and its Board of Trustees look to new ways to invigorate interest in BoT membership and that it prepare a strategic succession plan for future board leadership.
- Establish benchmarks of anticipated outcomes and competencies for each level so that teachers and parents will be clear about outcomes expectations from the Early Childhood, Lower Elementary, and Upper Elementary programs.

AMS Code of Ethics

Adopted by the American Montessori Society Board of Directors January 2022

Principle I: Commitment to Students & Their Families

- Share resources for protecting equitable access to all programs and services, regardless of each student's and family's race, color, culture, sex, sexual orientation, gender identity, religion, disability, age, genetic information, veteran status, ancestry, national or ethnic origins, or any other classification protected by applicable law.
- Support practices that protect the physical health and psychological safety of each student and family.
- Encourage independent action in the pursuit of learning, community building, and social action.
- Honor professional commitments, and maintain obligations and contracts while neither soliciting nor involving students or their families in schemes for commercial gain.
- Keep in confidence information that has been secured in the course of professional unless disclosure serves professional purposes or is required by law.

Principle II: Commitment to Staff & Colleagues

- Protect equitable access to AMS employment, programs, services, and other opportunities regardless of each individual's race, color, culture, sex, sexual orientation, gender identity, religion, disability, age, genetic information, veteran status, ancestry, national or ethnic origins, or any other classification protected by applicable law.
- Dedicate ourselves to recognizing, addressing, and eradicating all forms of racism and systemic oppression within our organization and programs.
- Represent one's own professional qualifications with clarity and true intent.
- Accept, offer, recommend, and assign professional positions and responsibilities on the basis of professional preparation and legal qualifications.
- Use honest, equitable, and effective methods of administering duties and conducting business.

Principle III: Commitment to the Montessori Movement

- Uphold and publicly support the greater vision of Dr. Maria Montessori through such initiatives as the development and promulgation of standards for affiliation of teacher education programs and accreditation of schools, the providing of professional development opportunities, and support of Montessori research and advocacy.
- Ensure that our work honors the core components of Montessori education: properly trained Montessori teachers, multi-age classrooms, the uninterrupted work period, the prepared environment, and child-directed work.
- Share perspectives consistent with all of the items set forth in the principles above, when engaged in public discussion.
- Distinguish private views from the official position of the American Montessori Society when engaged in public discussion.