



Five-Year Strategic Plan

July 2026 through June 2031

Our purpose is to sustain accessible, high-quality Montessori education in Englewood through stronger learning, stable programs and finances, supported leadership, and meaningful Community participation.

This plan covers The Montessori School of Englewood, early childhood, and Montessori Residency of Chicago (MRC). Year 1 focuses on improvement, financial stabilization, charter renewal, and the June 2027 leadership transition.

The Executive Committee approved this plan for charter-renewal purposes on Sep 23, 2026, subject to verified figures and reconciliation with the final five-year forecast. The ED and CFO may make non-substantive factual corrections; material changes must return to the Committee. Milestones are commitments, not completed results. Approval record: [Executive Committee Meeting Approved Meeting Minutes](#).

Goal 1: Improve learning and student support

Lead: Principal, with instructional leaders and the data analyst.

Align Montessori instruction with grade-level standards, language supports, and assessment. Use weekly teacher collaboration, coaching, and student work to improve instruction. Review intervention data every six weeks and report results every other Board meeting and verify the required student services monthly.

Annual measure	2026–27	2027–28	2028–29	2029–30	2030–31
ELA proficiency gain ¹	+3	+6	+9	+12	+15
Math proficiency % (proposed)	10%	12%	14%	16%	18%
State growth in both subjects ²	≥50	≥50	≥50	≥50	≥50
Instructional milestone	Verify baseline; 3 inquiry cycles per grade	Close Year 1 gaps; repeat cycles	80% of sampled classrooms meet each agreed practice	Sustain 80%; address gaps	90% meet each practice

¹ ELA values are cumulative percentage-point gains from verified 2026 proficiency. Math values are proposed percentages of tested students in grades 3–8 meeting or exceeding IAR proficiency: 10%, 12%, 14%, 16%, and 18%. Executive Committee approval of the revised math sequence is pending; it would replace the former cumulative math gains of +2, +4, +6, +8, and +10 points. Year 1 aligns with the Principal's 10% operational goal. From the provisional 5.1% math baseline, annual gains would be 4.9, 2, 2, 2, and 2 points. The Principal and data analyst must verify baseline test years, grades, counts, and inclusion rules against CPS results. ² The approved annual state-growth target remains at least 50 in both subjects; i-Ready growth is a separate measure. By 2031, reduce measurable Diverse Learner and multilingual learner proficiency gaps by 25% while improving each group's results. Seek an improved official designation by 2029 and sustain progress.

Every year: deliver all required services; document coaching and follow-up; provide each eighth grader with a transition plan and confirmed next-school destination.

Goal 2: Strengthen belonging, attendance, and retention

Leads: Principal for attendance and belonging; CSO for enrollment and retention.



Annual measure	2026–27	2027–28	2028–29	2029–30	2030–31
Chronic absence reduction ³ (percentage points)	5 pp	7 pp	10 pp	12 pp	15 pp
K–8 returning-student retention	85%	87%	88%	89%	90%
Belonging survey improvement ⁴	Set baseline	+3	+5	+8	+10

³ Cumulative percentage-point reductions from the verified FY26 chronic-absence baseline; absolute annual rates remain provisional until the baseline is verified. The earlier approximate 31% baseline is not used as a confirmed result. ⁴ Percentage-point gains from the Year 1 baseline; report student and family results and response rates separately.

Every year: review attendance weekly, respond to family barriers, track enrollment through actual attendance, and use departure feedback. By Year 2, reduce registration-to-first-day attrition 25% from baseline and target 80% preschool-to-kindergarten continuation, subject to baseline review, family choice, and admissions rules.

Goal 3: Stabilize TMSOE finances and sustain each program

Leads: Executive Director and CFO, with COO, CSO, and early childhood leadership. The Executive Director leads MRC accountability.

The organization will continue to maintain conservative budgets, protect required student services, and align program costs with dependable revenue. Program expansion will occur only when demonstrated demand, adequate staffing, and committed funding support the full cost.

TMSOE Financial benchmark	2026–27	2027–28	2028–29	2029–30	2030–31
Recurring operating margin	≥0%	≥0%	≥2%	≥3%	≥3%
Unrestricted operating cash	30 days	45 days	60 days	75 days	90 days
Current ratio	≥1.20	≥1.30	≥1.40	≥1.50	≥1.50
Net asset ratio	No erosion	≥20%	≥25%	≥30%	≥35%

FY2027: Address the annual enrollment funding reduction and maintain a balanced budget.

By 2028: Meet all CPS short-term financial indicators and earn fewer than two cumulative points across the long-term financial metrics.

By 2030: Meet all CPS short- and long-term financial metrics, achieving zero points.

Ongoing: TMSOE executive leaders meet with the CFO monthly to review financial information. The Board President is kept apprised of adjustments regularly. The ED and CFO will verify the FY26 financial baseline and reconcile these benchmarks with the final forecast and CPS feedback on its new financial rubric; any material change must return to the Committee. The annual margin benchmarks are targets, not forecast results. CPS's initial FY27 allocation provides a 370-student floor at \$15,445.60 per pupil: \$540,596 below the 405-student budget assumption, conditional on unchanged allocation terms. Contingency alternatives show gross savings of \$423,825 or \$466,825, with residual gaps of \$116,771 or \$73,771 before other adjustments; neither is verified net savings.

Ongoing: TMSOE will maintain a structured and transparent financial monitoring process to support long-term stability and responsible use of resources. The Executive Director and CFO will meet monthly to review the budget, actual revenue and expenditures, cash flow, enrollment, staffing costs, program expenses, and progress toward established financial benchmarks. The Board Finance Committee will meet monthly to review financial statements, budget-to-actual performance, cash position, enrollment-related revenue, financial risks, and any projected budget gaps or necessary corrective actions. School leadership will also participate in monthly departmental budget planning to monitor spending, anticipate upcoming needs, and ensure resources remain aligned with program priorities and available funding. Significant financial changes or risks will be communicated to the Board, and



financial projections and benchmarks will be reviewed annually against actual performance, funding conditions, and CPS financial requirements to maintain accountability, transparency, and long-term sustainability.

Annual programmatic benchmarks

Year	Early childhood	Montessori Residency of Chicago
2026–27	Verify award-funded slots, costs, and readiness baselines; address observation findings.	Complete a full-cost model by December 2026; establish completion, credential, and placement baselines.
2027–28	Reach 95% funded-slot utilization; assess partnerships against costs, cash timing, and Montessori quality.	Each cohort covers full allocated costs or has a funded, time-limited Board-approved subsidy.
2028–29	Maintain utilization; review readiness progress and any bilingual or early childhood pilots.	Reach 85% on-time completion; target 90% retention of eligible continuing TMSOE teachers.
2029–30	Maintain utilization; adjust coaching and services based on readiness and quality reviews.	Sustain completion and teacher-retention targets; review graduate outcomes and program costs.
2030–31	Improve literacy, math, and cognitive readiness by 10 percentage points from spring 2026, capped at 100%; sustain stronger domains.	Evaluate five-year outcomes; approve the next sustainable program plan and preserve accreditation.

Financial and operational safeguards

Every year: use a monthly reforecast and rolling 13-week cash projection; review cash monthly. Test enrollment declines, lower per-pupil funding, delayed reimbursements, service costs, and urgent repairs. Set fundraising targets that distinguish received cash, pledges, and uncommitted gifts.

By March 2027: complete the f [x Facilities Assessment.xlsx](#) , risk register, and funded capital schedule. Review annually and fund priority work before expansion.

Act immediately on a projected payroll shortfall, cash below 30 days, or material missed savings. Reforecast enrollment shortfalls before new commitments. Require a Board decision on program subsidies or missed cash targets.

Goal 4: Complete the transition and strengthen accountability

Leads: Board President and succession committee for transition; ED for leadership reviews; COO for operational continuity.

Year	Benchmark and evidence
2026–27	Reconvene the Succession Committee in December 2026 and implement the next planning steps through March 2027; confirm decision rights and assess successor readiness; complete the planned handoff by June 30, 2027, subject to Board appointment. Document authority, access, knowledge transfer, and emergency coverage.
2027–28	Complete transition reviews at 90 and 180 days only; address identified gaps and evaluate successor effectiveness.
2028–29	Verify that quarterly leadership reviews occur.
2029–30	Review leadership capacity, succession coverage, and staffing against the plan's next phase.
2030–31	Evaluate five-year leadership and governance results; approve the next strategic plan with current evidence and financial projections.



Every year, the ED conducts quarterly STACK reviews of the Principal, CSO, and COO. The Board evaluates the ED, completes its self-assessment, and reviews material providers annually. STACK is the rubric used for leadership evaluation. Each STACK records priorities, expected results, evidence, actions, and review dates. Test coverage for critical functions annually.

Goal 5: Give the Community a meaningful role in decisions

Leads: ED and engagement leads, with the Board.

Year	Benchmark and evidence
2026–27	Gather input from families, students, staff, and partners through accessible multilingual surveys.
2027–28	Review which groups participated and address gaps, including early childhood, multilingual, and Diverse Learner families.
2028–29	Evaluate whether community-informed changes improved school experience and access; revise weak approaches.
2029–30	Use community feedback to shape priorities for the next strategic planning cycle.
2030–31	Share five-year results and document how community input shaped the next plan.

Every year: document community input on at least one academic and one financial decision. Record the question, participants, feedback, Board response, and changes made. Publish an accessible “what we heard and decided” update within 30 days of the decision.

How will we review progress?

Monthly: leadership reviews enrollment, attendance, services, cash, staffing, and compliance.

Quarterly: the ED and Principal assess academic results and implementation evidence, update goal status, and record corrective actions, accountable roles, and due dates. The Board reviews milestones and receives intervention results every other meeting. Align annual budgets, the school improvement plan, and leadership STACKs to these five goals.

When academic or attendance results fall below plan goals, the Principal provides a formal Board report. When financial results fall short of plan goals, the ED reports the necessary course corrections. Record the response, the responsible leader, the deadline, and the reassessment date; escalate safety and material compliance issues immediately.

To fulfill the approval conditions, verify financial, academic, and attendance baselines, funded enrollment, program costs, and the five-year forecast. Retain the approved version and minute citation; return material revisions to the Committee. Review and refresh the plan annually.