**ESC**
PROFESSIONAL, AFFORDABLE CONSULTING FOR NONPROFITS

Executive
Service
Corps
*of The Triangle*

July 3, 2013

Liz Baird, Board Chair
Summer Clayton, Director
Exploris Middle School
401 Hillsborough St.
Raleigh, NC 27603

Dear Liz and Summer,

Thank you very much for giving ESC the opportunity to work with the Exploris Middle School (EMS) on your strategic plan. All of us enjoyed working with you and your planning team. The completed strategic plan (copy attached) is the key deliverable of our joint work. This report briefly reviews the process that we worked on together.

On January 23, 2013, EMS contracted with the Executive Service Corps of the Greater Triangle to conduct a strategic planning process.

EMS established a Strategic Planning Committee (SPC) consisting of:

| | |
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| Liz Baird | Board Chair, SPC Chair |
| Summer Clayton | Director, SPC Co-Chair |
| Sean Gargan | Board Chair (designate) |
| Shannon Hardy | EMS Teacher |
| Susan Johnston | Board Member |
| Karen Rectanus | EMS Teacher |
| David Wisz | EMS Parent |
| Barry Koster | EMS Board Member |

The Members of the ESC Consulting Team are:

| | |
|---|---|
| Edward Haugh | Lead Consultant |
| Doug Hurley | Consultant |

Janet McCauslin          Consultant


Starting with a preliminary meeting on February 6, 2013, the SPC has held nine meetings, generally lasting about two hours. The EMS planning team also held several internal meetings to review and revise the plan, and the team consulted extensively with EMS teachers and other stakeholders:


1.      Planning and mission statement review

2.      Internal and external issues facing EMS (SWOT analysis)

3.      EMS values

4.      Strengths, weaknesses, opportunities and threat analysis

5.      Critical issues

6.      Goals

7.      Strategies

8.      Revising the strategies and implementation

9.      Final meeting – Plan implementation process


ESC provided a report summarizing each meeting to the planning committee. The planning project was completed ahead of schedule with the last meeting held on June 19, 2013. ESC was pleased to note that your team took strong ownership for development of the plan, working on refining the plan between the scheduled meetings. Your team spent considerable time developing a new EMS values statement. A copy of the completed plan is attached.

During the last meeting, the ESC team suggested that you use a committee structure to implement the plan. We also provided you with a suggested format for monitoring the progress of the goals and strategies, as well as a scheduling format. (These formats were sent to EMS with the Meeting 9 Summary. Copies are available if required).

We were pleased to note that your board approved the plan and that you are already making good progress on the detailed planning of your expansion project.

We at ESC appreciate the opportunity to work with EMS, and we hope that we can work together again in the future. If you need any assistance in planning your expansion project or in board development, please do not hesitate to contact us. We wish you all the best in the important endeavor of expanding EMS into a full-fledged K–8 school.


Sincerely,


Ed Haugh

Doug Hurley

Janet McCauslin

# EXPLORIS STRATEGIC PLAN 2013-2018

## MISSION

Exploris is a learning community that engages students in a rigorous, relevant, relationship-based education.  This is done through experiential, project-based learning that empowers students to build a connected, just and sustainable world.

## VISION

Exploris will be a catalyst for solving present and future problems across the street and around the world.

## CORE VALUES

Exploris is a school founded on the principles of Global Education.  According to David Selby and Graham Pike, international leaders in this approach, Global education is based upon "the interconnectedness of communities, lands, and peoples, the interrelatedness of all social, cultural and natural phenomena, links between past, present and future, and the complementary nature of the cognitive, affective, physical and spiritual dimensions of the human being. It addresses issues of development, equity, peace, social and environmental justice, and environmental sustainability. It encompasses the personal, the local, the national and the planetary. Along with these principles, its approach to teaching and learning is experiential, interactive, children-centred, democratic, convivial, participatory, and change-oriented."

Exploris's articulation of its core values ground the school in this global approach. Those values are:

**CURIOSITY -** True knowledge does not occur without curiosity. Students are empowered to ask questions about the world around them and to explore possible answers.

**REFLECTION -** In an ever-changing world of new ideas, the importance of reflecting on one's own thinking and the thinking of others cannot be underestimated.  Exploris values the creation of time to slow down, to reflect, and to build connections.

# EXPLORIS STRATEGIC PLAN 2013-2018

**CRAFTSMANSHIP -** Producing an exemplary product is challenging.  It takes attention to detail, grit, perseverance, revision, and tenacity.  It takes a growth mindset and a dedication to competing with one's own personal best.

**ENGAGEMENT-** People learn best when they are exposed to meaningful, complex issues that are applicable to their own lives. Teachers engage students in current, relevant issues by solving authentic problems that are being addressed beyond the four walls of the school building. Student work is tangibly connected not only to the local community, but also to other regions of the world and to past and future events.

**COLLABORATION -** Learning is a democratic process that is enhanced through the sharing of different perspectives and life experiences. Collaboration results in a tapestry of learners who know they can depend on each other and work together in almost any situation. With collaboration, the end product is deeper, and Exploris students experience a collective sense of accomplishment and ownership.

**RELATIONSHIPS -** A nurturing school environment is one where students are encouraged to build and maintain positive relationships with their teachers, parents, peers, and community.  With a keen understanding of the unique development of the age group that they teach, teachers are intentional about the structures and relationship-building activities that they design.

**CONNECTIONS TO NATURE -** When students witness the power and elements of the natural world through adventure and stewardship, they begin to view themselves as just one species within a larger system.

# EXPLORIS STRATEGIC PLAN 2013-2018

**SOCIAL EMPOWERMENT -** Students realize that they have the power to change how their world works. They know how to navigate public systems, lobby public officials, and present their research and opinions as responsible citizens.

**INNOVATION -** In a constantly changing world, the ability to approach challenges in a new way is vital.  Exploris teachers and students design projects that encourage divergent thinking, creativity, ideation, and risk-taking.

**BALANCE -** To be fully human, students must be healthy in mind, in body, and in spirit.  Emphasis on students' physical and emotional health prepare them for the mental challenges necessary in achieving total success in school.

## SWOT Analysis

### March 21, 2013

| Strengths | Opportunities |
|---|---|
| <ul><li>Strong brand/reputation in Raleigh</li><li>Global learning module</li><li>Exchange programs with Japan, Germany</li><li>Partnership with NC Museum</li><li>Strong community partnerships (university, museums, businesses, municipal agencies)</li><li>Strong curriculum/pedagogy (project based, integrated to 21$^{st}$ century, service learning, Outward Bound, issue oriented)</li><li>Only 68 students per grade level</li><li>6 grade level classes – 34 students/class</li><li>*Location in heart of downtown Raleigh*</li><li>Current partnerships w/ businesses</li><li>Highly qualified staff</li><li>Low student/teacher ratio</li><li>Financially responsible/credit worthy</li><li>Flexible schedules capitalize on events</li><li>Safe, secure, open environment a</li></ul> | <ul><li>Unmet demand for student places at EMS (waiting list)</li><li>Charter School friendly legislature</li><li>Strong growth in Triangle</li><li>Urban renewal in Raleigh</li><li>No other downtown elementary school</li><li>Global demand for new exchange partnerships</li><li>New community partnerships</li><li>Becoming a charter school leader/model</li><li>*Being a middle school; limited grade span*</li><li>Exploris Middle School Board of Directors</li><li>*Location in heart of downtown Raleigh*</li><li>New partnerships with businesses</li><li>Networking ability</li><li>Properties available (own vs. rent)</li></ul> |

| | |
|---|---|
| school<br>• Strong parental support<br>• EC Program | |
| Weaknesses<br><br>• Lack of financial sustainability (depleting reserves)<br>• *Being a middle school; limited grade span*<br>• Building facility prohibits further growth, limited parking/no evening use/limited classroom space/limited outdoor space<br>• Limited IT resources infrastructure<br>• Lease runs through 2024 (??)<br>• *Dependence on state/federal budgets/lack of funds from other sources*<br>• Employees compensation/benefits vs. public schools<br>• Student demographics (too little diversity)<br>• Low visibility in the community; need to promote awareness<br>• Exceptional children programing<br>• Lack of support staff | Threats<br><br>• Cost of special education<br>• Reliance on government funding<br>• State/Federal budget cuts<br>• Charter School friendly legislature may produce competitors<br>• New charter schools in planning stage<br>• *Dependence on state/federal budgets/lack of funds from other sources*<br>• Rising cost of downtown real estate<br>• New demands on teacher/staff training, paperwork<br>• Potential teacher turnover<br>• Lawsuits (EC) |

Note: items in italics appear in two or more boxes

# CRITICAL ISSUES

**Core Problem:**  EMS has developed a sound middle school education program that is recognized for its teaching excellence, innovation, focus on STEM, and strong student outcomes. However, EMS's impact on the community is limited because inadequate physical facilities, low student enrollment capacity, and insufficient revenues are working in a vicious cycle to prevent EMS from capitalizing on its opportunities.   Unless addressed, these interrelated problems threaten the long-term viability of the school.

**Five-Year Strategic Vision:**  Exploris Middle School will be transformed into a leading K-8 charter school in the Triangle Area with facilities located on a spacious, modern campus in downtown Raleigh, serving a population of approximately 500-600 students.  Exploris students will benefit from a global education methodology aligned to national curriculum standards and instructional best practices.  The Exploris instructional approach will be supported by an extensive information technology platform, allowing Exploris students to broaden their connectivity to the world.

## GOALS TO ADDRESS CRITICAL ISSUES

Based on the SWOT exercise, the Strategic Planning Committee identified six critical issues that must be addressed in order to achieve the 5-year vision. What follows are the strategic goals that overcome each of the six issues:

## STRATEGIC GOAL 1: ENROLLMENT

*Exploris will increase student access by expanding enrollment to a K-8 population of approximately 500-600 students.*

> **Strategy 1.1:** Develop a sustainable Enrollment Plan for Exploris as a K-8.
>
> **Strategy 1.2**: Commit to a demographic that reflects the local community
>
> **Strategy 1.3:** Gain Office of Charter School approval for a K-8.
>
> **Strategy 1.4:** Recruit and assign committees to develop and carry out action steps for Strategic Plan Goals 2-6.

## STRATEGIC GOAL 2: FINANCE

*Exploris will develop adequate financial resources to ensure its long-term financial sustainability.*

> **Strategy 2.1:** Develop a sustainable budget for daily operating costs as a K-8.
>
> **Strategy 2.2**: Develop a fund development plan, based on requirements from the facilities and infrastructure deliverables for transition to K-8.

## STRATEGIC GOAL 3: FACILITIES AND INFRASTRUCTURE

*Exploris will acquire a facility that supports its educational program and is financially sustainable, while enabling the long-range strategic vision.*

> **Strategy 3.1**: Articulate a set of facility and technology requirements to accommodate enrollment expansion, curriculum needs, and core values.
>
> **Strategy 3.2**: Identify and acquire new space based on cost-benefit analysis.
>
> **Strategy 3.3:** Develop a facility and technology migration plan.

## STRATEGIC GOAL 4: STUDENT ACHIEVEMENT

*Exploris will provide students with demonstrable skills and knowledge designed to equip them for solving problems across the street and around the world.*

**Strategy 4.1**: Create a curriculum map, with scope and sequence, for grades K-8

**Strategy 4.2**: Articulate essential skills and social competencies that embody success at Exploris

**Strategy 4.3**: Implement an assessment model for measuring outcomes related to the Exploris mission

**Strategy 4.4:** Strengthen programming to maximize resources while ensuring a free and appropriate education for ALL students.

## STRATEGIC GOAL 5: SCHOOL LEADERSHIP and HUMAN RESOURCE DEVELOPMENT

*Exploris will attract, develop and retain cutting edge school leadership, instruction and ancillary supports to meet the needs of an expanding student population.*

**Strategy 5.1**: Develop a human resource needs assessment to identify current position requirements and identify staffing gaps for future hiring decisions.

**Strategy 5.2:** Create a recruitment plan for filling new vacancies, including recruitment incentives, online application databases, and early employment contracts in order to attract the best and brightest while retaining a cutting edge staff.

**Strategy 5.3:** Initiate a professional development plan, focused on continuous learning and improvement for returning staff and an orientation and training program for new personnel.

**Strategy 5.4:** Develop a mentorship program for grooming new internal leaders.

## STRATEGIC GOAL 6: BRANDING, MARKETING and ADVOCACY

*Exploris will establish itself as an educational leader in NC - widely recognized for its educational excellence, student success, leadership, and public advocacy*

> **Strategy 6.1:** Develop the Exploris brand as a center for educational innovation and achievement.

> **Strategy 6.2:** Develop a marketing and communication plan to address both internal as well as external communications

> **Strategy 6.3:** Extend Exploris's network of public and private partnerships regionally, nationally, and internationally.

# EXPLORIS STRATEGIC PLAN 2013-2018

| STRATEGIC GOALS TIMELINE | | | |
|---|---|---|---|
| **GOAL 1:**<br>**ENROLLMENT** | *Increase student access by expanding enrollment to a K-8 population of approximately 500-600 students.* | | |
| | STRATEGY | TARGET DATE | RESULTS |
| | 1.1**:** Develop a sustainable enrollment plan for Exploris as a K-8 school. | June/July 2013 | |
| | 1.2: Gain Office of Charter School approval for a K-8. | Fall 2013 | |
| | 1.3**:** Recruit and assign committees to develop and carry out action steps for strategic plan goals 2-6. | July 2013 | |
| **GOAL 2:**<br>**FINANCE** | *Develop adequate financial resources to ensure its long-term financial sustainability.* | | |
| | STRATEGY | TARGET DATE | RESULTS |
| | 2:1  Develop a sustainable budget for daily operating costs as a K-8. | Fall 2013 | |
| | 2.2: Develop a fund development plan, based on requirements from the facilities and infrastructure deliverables for transition to K-8. | Fall 2013 | |
| **GOAL 3:**<br>**FACILITIES AND**<br>**INFRA-**<br>**STRUCTURE** | *Acquire a facility that supports our educational program and is financially sustainable while enabling our long range strategic vision.* | | |
| | STRATEGY | TARGET DATE | RESULTS |
| | 3.1: Articulate a set of facility requirements to accommodate enrollment and technology expansion, curriculum needs, and core values. | Fall 2013 | |
| | 3.2: Identify and acquire new space based on cost-benefit analysis . | Winter 2013/2014 | |
| | 3.3**:** Develop a facility and technology migration plan. | Spring 2014 | |
| **GOAL 4:**<br>**STUDENT**<br>**ACHIEVEMENT** | *Provide students with demonstrable skills and knowledge designed to equip them for solving problems across the street and around the world.* | | |
| | STRATEGY | TARGET DATE | RESULTS |
| | 4.1: Create a curriculum map, with scope and sequence, for grades K-8 | TBD upon approval from OCS | |
| | 4.2: Articulate essential skills and social competencies that embody success at Exploris. | Spring 2014 | |
| | 4.3: Implement an assessment model for measuring outcomes related to the Exploris mission. | Spring 2014 | |
| | 4.4**:** Strengthen programming to maximize | On-going | |

| | | | |
|---|---|---|---|
| | resources while ensuring a free and appropriate education for ALL students. | | |
| **GOAL 5: SCHOOL LEADERSHIP and HUMAN RESOURCE DEVELOPMENT** | *Attract, develop and retain cutting edge school leadership, instruction and ancillary supports to meet the needs of an expanding student population.* | | |
| | **STRATEGY** | **TARGET DATE** | **RESULTS** |
| | 5.1: Develop a human resource needs assessment to identify current position requirements and identify staffing gaps for future hiring decisions. | TBD upon approval from OCS | |
| | 5.2: Create a recruitment plan for filling new vacancies, including recruitment incentives, online application databases, and early employment contracts in order to attract the best and brightest while retaining a cutting edge staff. | TBD upon approval from OCS | |
| | 5.3: Initiate a professional development plan, focused on continuous learning and improvement for returning staff and an orientation and training program for new personnel. | Spring 2014 | |
| | 5.4: Develop a mentorship program for grooming new internal leaders. | Spring 2015 | |
| **GOAL 6: BRANDING, MARKETING and ADVOCACY** | *Establish Exploris as an educational leader in NC - widely recognized for its educational excellence, student success, leadership, and public advocacy.* | | |
| | **STRATEGY** | **TARGET DATE** | **RESULTS** |
| | 6.1: Develop the Exploris brand as a center for educational innovation and achievement. | Summer 2013 | |
| | 6.2: Develop a marketing and communications plan to address both internal as well as external communications. | Fall 2013 | |
| | 6.3: Extend Exploris's network of public and private partnerships regionally, nationally and internationally. | On-going | |