C.2 Advertising and Promotion

Three-Five Year Strategic Marketing Plan
Once the charter has been awarded to Camino Montessori School, an active and aggressive marketing program will begin. Our Board and Executive Director will begin to further define and map out our strategic plan for our first 3-5 years of operation (see next section for marketing template). A variety of outreach methods will be used to inform the target market, as well as the community at large of the opening of Camino Montessori, including the many benefits for children enrolling. The benefits highlighted will include high academic standards, small class size, Montessori philosophy, innovative approaches to teaching, and our high level of safety as a result our small school size. Although our marketing plan provides for a variety of printed and broadcast media materials, we whole-heartedly believe in a grassroots approach and the power of "word of mouth". Montessori schools provide unique learning environments that tend to attract parents who are looking specifically for what Camino Montessori has to offer. Although we understand that we must comply with open enrollment rules and regulations, our intention is to target this specific audience of "Montessori" parents who are typically members of the international community; the home schooling community; of Catholic and other religious communities; and from students with special needs.

We believe that communication is an all-encompassing process; Board meetings, parent meetings & conferences, long-range planning meetings; classroom newsletters, financial reports, handbooks, and curricular processes all are manifestations of communications that allow for a thriving and connected *whole*.

Communication is a necessary extension of our school business for the simple reason that enrollment and retention of students is the basis of all revenue. However, revenue is not our only motivation to aspire to a healthy environment. We also believe that larger enrollment allows students greater choices for socialization.

Integrated with a long-range plan, successful marketing can substantially change the image of a school by really addressing its weaknesses, both real and perceived. Our initial challenge at Camino Montessori will be to make necessary improvements while still making it clear that our school is stable and has a secure base for our programs and operations.

Beginning in January 2012, the school's Director and Board Members will hold a series of meetings at the preschools throughout the cities of Maricopa and Casa Grande, rural areas surrounding the those two cities, and on the Gila River and Ak Chin Indian Communities. These meetings will be introductory as well informational. Attendee names, phone numbers and email addresses will be recorded and follow-up one-on-one meetings will occur with interested families.

The school is already a member of the City of Maricopa Chamber of Commerce and it is our intent to be active members of the Chamber, including attending monthly meetings and mixers to begin an organic word of mouth campaign about Camino Montessori.

A Website has already been designed and is in its early stages of development. It will include information about the school, Montessori, as well as contact and enrollment information. Our intention is to offer an interactive site for those interested in the Montessori Method, and for families interested in enrolling to be able to ask questions and receive answers either on-line or via e-mail.

We already have a preliminary postcard for Camino, and will continue our development of informational brochures which will be used for fundraising, community awareness, and enrollment. Our goal is to have these materials ready to print and send to our target market families February, 2012 (pending charter authorization). This will be an ongoing effort beginning in February and continuing throughout our first year, and subsequent years thereafter. In addition, we plan to advertise in the local papers, submit press releases, and attend community events where there is likely to be high foot traffic.

For continued growth, all of the methods of promotion and advertising will become cyclical and continue throughout the life of our school.

As part of its first order of business, upon receiving charter authorization, the Camino Board will convene and begin to articulate and further define the general areas of our market plan. An initial draft with specified target dates and anticipated budget allowances will be approved and adopted at this meeting.

Camino Montessori's *Strategic Marketing Plan*--Template

I. Elements of our plan to ensure successful development and growth of Camino Montessori:

A. Strategic Focus

B. Strategic Marketing Research

1. Grounded in research

2. Brand architecture—"umbrella brand" and sub brands (programs offered)

3. Positioning & Message

a) *Sample brand-positioning initiative:* "Preschool through 6th Grade private & charter school that offers a challenging educational program based on Montessori and progressive philosophies of educating the "whole child": cognitive—social—emotional—and physical

b) *Sample supporting Messages:* Independent, self-directed learning for life; child-centered community; caring and socially responsible citizens; progressively challenging and strong academic program that prepares students for the experiences and demands of higher education and beyond.

c) *Sample sub-brand positioning initiative:* For children aged 6-12 years, the Elementary I & II programs advances students' concrete and abstract reasoning abilities while enhancing their interpersonal skills in a mixed-age environment that promotes responsibility for self and respect for others.

d) *Sample supporting message:* "Spiral" approach that exposes stuents to a vast array of interrelated topics repeatedly over time as they move from the concrete to the abstract; Writing with clarity and reading with fluency; teaching of basic and advanced mathematical and scientific concepts; students complete

a variety of interdisciplinary projects, advancing their understanding of the interconnectedness of concepts and ideas.

4. Target audiences: External & Internal—surveys and other methods that reveal current trends in parent view of important attributes of school (i.e., quality of teachers, environment, opportunity for self-directed learning, etc.); level of satisfaction for school (i.e., Camino's ability to meet the individual needs of child; class size; quality of teachers; etc.); possibly a rating based on brief descriptors and adjectives (i.e., caring, warm, kind, supportive, etc.)

5. Tactics & Execution

C. Annual Strategic Marketing Plan & Related Tactics

1. Let the strategy drive the tactics

2. Keep "on-brand" with messages and outreach

3. Adjust for changing market conditions

4. Update annually

5. Where possible measure effectiveness of advertising expense

6. Be open to new avenues/tactics to reach target audiences

D. Tactical Marketing Plan

1. Print & Advertising base

2. Promotional flyers

3. Open House and Informational Meeting card/flyer design

4. Brand post card design

5. Website design & presence—*mission, vision, history, philosophy; admissions; curricular overview; links; etc.*

E. Internal Marketing & Attrition

1. Enrollment management and attrition

2. Strategic implications

3. Tactics

4. Keeping the "customers" happy

5. Ongoing research to "check the pulse" of the school community

6. Unique challenges for Montessori schools

7. Attrition Initiatives

a) Create the expectation to stay at Camino

b) Create excitement about Montessori education and our school

c) Create awareness of how Montessori consists of three cycles (Primary level, Elementary I level, and Elementary II level): each cycle—as a unit—offers maximum return on investment in the third year; with each successive cycle, the investment is enhanced.

d) Build a clear link (Kinder to 1st Grade benchmarks & outcomes; Elementary I (3rd Grade) benchmarks & outcomes; etc.

e) Foster a "one school" mindset by creating opportunities for all parents, students, teachers to interact with, learn from, and have meaningful conversations with one another.

F. Geographic Targeting Strategies

1. Identify where the business is

2. Know where our business is coming from

3. (Where the business is) minus (where our business is coming from) equals potential size of opportunity

4. "Penetration" (Increase inquiries & applications in our core market) and "Reach" (Expand our geographic area)

5. Demographic data and mapping analysis (incidence of children—ages, ethnicity, etc.; household income; parent educational levels, etc.)

6. Shifts in Marketplace Conditions/Variables (including changes in other public school options)

7. Resources available (ACSA, Census Bureau, etc.)

Cost Determinations

Camino Montessori procured marketing services from *Factor 1 Studio* located in the City of Maricopa in September, 2010. Our current contract extends through 12/2012. We have already established our initial website, created our logo, printed business cards and postcards, and our school logo banner. Factor 1 will assist in designing the tri-fold brochures for our initial marketing campaign, and we have allotted additional monies for other advertising, such as printing costs for the brochures and placing local newspaper ads, etc.

Total allotted for advertising and promotion:

- Start-up Budget = $6000

- 1st year Operations = $2000
- 2nd year Operations = $2000
- 3rd year Operations = $2000

TIMELINE ATTACHED