St. Croix Prep's Strategic Plan

5 year tracking sheet

Qtr 1	
Date and Year of Report	**November 17, 2926**
Strategy 4.1.E - Evaluate Expansion Opportunities and Risks	**Evaluate Expansion Opportunities and Risks**
Action Plan (Example-Develop a written Academic Excellence Framework document)	Conduct a comprehensive expansion review of opportunities and risks, including growth of the existing program and replication at a new site.
Leader Responsible	**Bill Blotske**

Overall Status

- ☑ **On Track** – Progress is occurring as planned
- ☐ **Some Concern** – Progress is occurring, but adjustments are needed
- ☐ **Off Track** – Significant barriers are affecting implementation
- ☐ **Completed** – Quarter or initiative expectations have been met

1. Executive Summary

In 3–5 sentences, summarize what occurred during this quarter. Identify the most important accomplishments, emerging concerns, and whether implementation is proceeding as planned.

Quarter Summary

The strategic planning team met October 7 and November 4 to begin evaluating expansion of St. Croix Prep's existing program or replication at a new site. The group reviewed potential phased growth, temporary leased space, enrollment demand, financial considerations, and examples from Eagle Ridge Academy and PACT. The November meeting documented a kindergarten waitlist of 252 and sixth-grade waitlist of 120, alongside significant capacity, infrastructure, and financing questions. The team is developing a go/no-go decision rubric and a two-stage recommendation and feasibility approach; no expansion decision has been made. Work is progressing through the exploratory stage, with material risks requiring further analysis.

2. Describing Implementation

Briefly describe how the initiative is being implemented. Include relevant grade spans, departments, programs, staff groups, or phases of implementation. For this quarter, focus on what has actually begun or been completed rather than restating the original plan.

Implementation Update
An interdisciplinary strategic planning team began its comprehensive expansion review in two meetings. Discussions focused on Lower School and Middle School section growth, the need to begin any phased expansion in kindergarten and roll cohorts upward, possible offsite leasing for younger grades, and potential replication at a separate location. The team considered bond structure and fund balance, reviewed Eagle Ridge Academy's greenlighting matrix and PACT's building/financing process, and identified site and building constraints. The November 4 meeting established the next process step: a rubric to inform a go/no-go recommendation, followed by feasibility work.

3. Monitoring Progress

Process Benchmarks

Report the quarter actions that were expected to occur. Indicate whether each benchmark was completed as planned.

Status Options: Not Started | In Progress | Met | Delayed | Revised

Process Benchmark	Person Responsible	Target Date	Status	Qtr Update / Evidence
Convene strategic planning team and establish focus	Bill Blotske / team	Oct. 7, 2026	Met	October 7 introductory meeting; scope includes existing-campus growth and replication.
Review comparable school expansion approaches	Jenn Fuchs / team	Nov. 4, 2026	Met	ERA decision matrix and PACT process/partners reviewed November 4.
Investigate existing bond structure	Keven Seim	Not specified	In Progress*	October 7 action to contact Dick Ward; completion not confirmed in supplied minutes.
Assess waitlist strength and enrollment demand	Jenn Fuchs	Nov. 4, 2026	Met	Survey drafting assigned October 7; November 4 reported K waitlist 252, grade 6 waitlist 120; survey not distributed, only drafted.
Develop expansion go/no-go rubric	Bill Blotske	Dec. 2, 2026 meeting	In Progress	Assigned November 4 for review at next meeting.
Explore feasibility study costs	Team	Not specified	Not Started*	November 4 minutes identify a possible planned consultation with JB Vang; no cost or completed consultation documented.

Progress Summary	
What has gone well?	Team established a shared scope, reviewed two peer-school approaches, documented waitlist counts, and identified a structured decision process.
What has been challenging?	Long-term grade-level capacity, existing bonds and fund balance, parking, building systems, shelter requirements, site access, and construction lead time.

Describe any benchmarks that needed revising.	No formal revisions documented. The group determined the ERA matrix lacked sufficiently direct steps and elected to develop its own rubric.

4. Measuring Impact

Early Evidence of Change

Report any early evidence showing that implementation is beginning to affect practice, behavior, attitudes, systems, or student outcomes. Quarter evidence may be preliminary.

Early Evidence of Change Benchmark	Measure / Evidence Used	Person Responsible	Target Date	Status / Qtr Result
Document demand and capacity	Waitlist counts and grade-level discussion	Team	Nov. 4, 2026	Baseline noted: K 252; grade 6 120; no waitlist grades 7-12.
Establish decision-making framework	Meeting decision and rubric assignment	Bill Blotske	Dec. 2, 2026	Rubric assigned; not yet reviewed.
Identify facility feasibility barriers	Meeting review of infrastructure and site	Team	Nov. 4, 2026	Parking, rooftop units, shelter requirements and access identified.

What are we learning?	
What does the Qtr evidence suggest about whether the	Waitlist demand is concentrated in younger grades, but expanding kindergarten sections would create additional K–12 capacity needs as cohorts advance. A defensible

initiative is having its intended impact?	expansion decision requires financial, facilities, enrollment, and cultural analysis.

Data not yet available	
Identify important outcome measures that will not be available until later in the year.	Waitlist survey results/intent to enroll; financing and bond analysis; feasibility study cost; validated capital estimates; detailed site and classroom capacity plan; comparative option costs and timeline.

5. Resources Supporting Implementation

Identify significant people, time, materials, technology, professional development, or funding used during the quarter. Note any anticipated resource changes.

Resource	Existing Resource / Expanded Use	Reallocation or Reassignment	New Resource / Cost	Qtr Update / Notes
Strategic planning team	Existing staff and stakeholder expertise	None documented	Not specified	Two meetings held.
External peer-school information	ERA matrix and PACT experience	None documented	Not specified	Reviewed November 4.
Financial / feasibility expertise	Bond inquiry, financial feasibility	None documented	Cost not yet known	Potential financing partners discussed.
Design / construction expertise	Pope Architects prior school work noted	None documented	Not approved / not priced	Pope identified as a past school project partner.

Resource Concerns

- ☐ No additional resources anticipated at this time
- ☑ Additional resources may be needed
- ☐ Reallocation of existing resources is recommended
- ☐ Budget adjustment may be necessary

Explanation, if applicable:	Feasibility study support, financial analysis, and construction expertise may require additional resources. The minutes do not document a funding request, contract, or approved cost.

6. Communication Plan

Identify significant communication completed during the quarter and upcoming communication related to this initiative.

Communication / Audience	Person Responsible	Date	Status	Qtr Update / Next Step
Strategic planning team meetings	Bill Blotske / team	Oct. 7 and Nov. 4	Met	Reviewed expansion options and risks.
Waitlist-family survey	Jenn Fuchs	Nov. 4	Met	Draft assigned October 7; distribution not confirmed.
Peer school outreach: Eagle Ridge / PACT	Jenn Fuchs / team	By Nov. 4	Revie wed	ERA and PACT approaches discussed November 4.
Next team meeting / rubric review	Bill Blotske / team	Dec. 2, 2026	Plann ed	Review draft go/no-go rubric.

7. Challenges, Risks, and Adjustments

Identify any barriers or emerging issues that could affect successful implementation. Explain what is being done in response.

Challenge / Risk	Impact on Initiative	Response / Adjustment
Enrollment and K–12 capacity	Additional K sections eventually create about 30 more students per grade; upper-school crowding risk.	Consider phased rollout and offsite leasing; analyze long-term capacity.
Financing / current bonds	Bond restrictions and fund balance could limit financing choices.	Keven to consult Dick Ward; consider financing/feasibility expertise.
Building / site constraints	Existing rooftop unit upgrades, parking needs, secondary county-road access, and potential tornado-shelter requirement (estimated extra $3M) may increase cost.	Include these items in feasibility and option analysis; cost figure is preliminary discussion, not a verified estimate.
Timeline / process uncertainty	Construction discussed as roughly four years; decision criteria not yet finalized.	Create go/no-go rubric and use a two-stage recommendation/feasibility process.

If no significant concerns exist, state: **No significant barriers have been identified at this time.**

8. Priorities for next quarter

Identify the 3–5 most important actions or outcomes expected during the next reporting period.

Next Quarter Priority	Person Responsible	Target Date
1. Complete and review draft go/no-go expansion rubric	Bill Blotske	Dec. 2, 2026
2. Clarify current bond structure and constraints	Keven Seim	Not specified
3. Develop and assess waitlist-family survey	Jenn Fuchs	Completed. Not scheduled to be sent.

4. Obtain feasibility-study cost information from JB Vang	Team (individual not specified)	Not specified
5. Advance facility/site and financial feasibility considerations	Strategic planning team	Not specified

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9. Board-Level Summary

Overall Quarter Assessment:

- ☑ On Track
- ☐ Some Concern
- ☐ Off Track
- ☐ Completed

One key accomplishment the Board should know	The team has begun a structured expansion review, compared peer-school approaches, and established a rubric-based go/no-go evaluation process.
One issue or decision the Board should be aware of	Strong younger-grade waitlists coexist with substantial K–12 capacity, financing, parking, infrastructure, access, and possible shelter-cost constraints. No expansion recommendation has yet been reached.

Board action needed at this time:

- ☐ None
- ☑ Information/Discussion
- ☐ Policy Direction
- ☐ Budget/Resource Approval

Source basis: Strategic Planning Meeting 4.1.E minutes dated October 7 and November 4, 2026. Reporting date, status selections, and board-action classification are draft recommendations for confirmation; no unrecorded completion is assumed.