

ASSOCIATION OF INDEPENDENT SCHOOLS IN NEW ENGLAND

EVALUATION REPORT FOR

OAK MEADOW MONTESSORI SCHOOL

Littleton, MA

October 21-24, 2007

Oak Meadow Montessori School

October 21-24, 2007

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School Information

School Name and Address:	Oak Meadow Montessori School 2 Old Pickard Lane Littleton, MA 01460
Date Founded:	November 28, 1977
Student Body:	Coeducational, Day
Grades Covered:	Pre-Kindergarten Through Eighth Grade
Number of Sections per Grade:	6 Children's House (Two Half Day; Four Full Day) 5 Lower Elementary 3 Upper Elementary 1 Middle School
Number of Students Enrolled:	119 Boys 136 Girls 255 Total
Number of Faculty:	25 Full-Time 13 Part-Time 38 Total
Teacher/ Student Ratio:	1/7

Introduction

Oak Meadow Montessori School is a vibrant place populated by engaged and energized students and staff. It was immediately clear to the Visiting Team upon arriving at the School that Oak Meadow enjoys a powerful and important presence in the lives of all of its constituents. The faculty, staff, and Board of Trustees are open, friendly, inviting, and eager to share all that they love about their school. The students, among the most out-going and friendly the Visiting Team has encountered, clearly showed their strong affection for their school while exhibiting to the team through their achievements the great depth and scope of the education they are receiving. Overall, the Team was impressed by the atmosphere of Oak Meadow and all the individuals who make it so remarkable.

The Visiting Team would like to thank the School for its hospitality, from our beautiful and comfortable accommodations to the ever-present food and snacks. We were particularly grateful for the delicious lunch cooked for us by the Middle School students on Tuesday. We would also like to thank Head of School David Stettler, the Board of Trustees, and the School's entire administrative team, faculty and staff for making our visit such a pleasant experience. A special thanks, too, goes to Abigail Miller and particularly to Barbara Orlowitz for their exceptional job in guiding the School through the Self Study process and in preparing a well organized, attractive, and comprehensive Self Study document.

In conclusion, the Visiting Team has seen in Oak Meadow Montessori School a happy, safe, and academically rich environment in which each individual is valued and respected, and in which each child is given the room to grow and succeed.

SECTION I — MEMBERSHIP CRITERIA

MEMBERSHIP CRITERIA

The school conforms to requirements for membership in AISNE in that it:

1. *Has a clear statement of mission and philosophy.*

The School has a clear statement of mission and philosophy adopted on March 1, 2006.

2. *Consists of three or more consecutive grades in kindergarten through grade 9 or equivalent.*

The School serves children from the age of three through eighth grade.

3. *Is incorporated as a not-for-profit organization as attested by federal and state records.*

The School is incorporated as a not-for-profit organization, a 501C3 corporation, as attested by federal and state law. The school was incorporated on November 28, 1977.

4. *Has a non-discrimination statement as required by law.*

The School has a non-discrimination statement, which was recently revised on February 26, 2007. It states:

Oak Meadow Montessori School does not discriminate in admission, financial aid, administration of its educational policies and employment practices on the basis of race, color, national or ethnic origin, sex, sexual orientation, marital status, or status as a qualified handicapped individual.

5. *Is governed by an appropriately constituted and substantially independent governing board, in accordance with the by-laws of the corporation?*

The School is governed by a Board of Trustees that consists of thirteen voting members.

6. *Has procedures to ensure that no governing board members have conflicting interests between their duties to the school and their business or professional roles.*

The School has several avenues of making sure that there are no conflicts of interest among the members of the Board of Trustees. The Committee on Trustees research all possible conflicts before a candidate is nominated, the new Trustees are educated during their orientation sessions, and each Trustee annually signs a “Conflict of Interest Statement.”

7. Has an annual audit of school's financial statements performed by an independent certified public accountant.

The School has an annual audit of its financial statements performed by an independent certified public accountant.

SECTION II — SELF STUDY DOCUMENT

8. MAJOR STANDARD

The school has completed a thorough Self Study as outlined in the Manual for School Evaluation: Pre-K–9, documented its strengths and weaknesses, and described any plans to implement change.

The Visiting Team commends the Oak Meadow Montessori School on the completion of their Self Study. The document was well written, very organized and comprehensive. It was written in one voice making readability and comprehension of content very easy and informative.

9. *The preparation of the Self Study document was an inclusive process, allowing the school community to participate.*

The extent to which The Oak Meadow Montessori went through to include all members in the writing and completion of this document should be commended. Everyone's opinion and expertise was used to ensure that a true picture was reflected in this final product.

Commendations:

The Visiting Team commends Oak Meadow Montessori School on a well written, very organized and comprehensive Self Study.

Oak Meadow is commended for ensuring that all members were included in the writing and completion of this document.

SECTION III — MISSION AND PHILOSOPHY

10. MAJOR STANDARD

There is a high degree of congruence between the school's stated mission and philosophy and its actual program, planning and decision-making.

Mission Statement:

“Oak Meadow Montessori School is dedicated to the child-centered Montessori philosophy which fosters academic excellence, personal growth and cultural awareness while nurturing children’s spirits. A diverse community of life-long learners, we cultivate confident, independent and compassionate human beings by providing the tools and experiences needed to embark on rich, meaningful journeys as responsible citizens of the world.”

It is obvious that much time and effort were put into the creation of Oak Meadow Montessori School’s mission and its actual program. The mission statement clearly reflects the basic strands of the Montessori philosophy, as does the School’s statement of educational philosophy. All School faculty and staff participated in the redrafting of the statements. The Visiting Team was impressed by the School’s dedication and inclusiveness in this process.

The school’s mission is published in the Student/Parent Handbook, Admission brochures, Strategic Planning document website, and more. It is visible throughout the School, in writing and in everyday practices.

Oak Meadow is committed to nurturing student’s spirits in a safe, diverse, compassionate, and well-prepared environment. The School demonstrates this in daily/weekly practices, such as Monday meeting and community service. The School’s staff is dedicated to providing the students with experiences that enhance their responsibility, personal growth, and cultural awareness. (The Middle School and Upper Elementary camping trips, food project, and in-depth study of a country which includes a visit to that country.) From an administration perspective, the school has a democratic decision-making process that gives a voice to all of its constituents.

All members of the community live the mission on a daily basis. Oak Meadow is a warm, welcoming community. It was a privilege and honor for the Visiting Team to observe and be a part of the School.

11. *The school periodically reviews its mission and philosophy.*

Oak Meadow's old mission was drafted by Board Members in 1995. The new mission and philosophy statements were recently rewritten in the fall of 2005. They were adopted by the Board of Trustees and made available to the School's constituents for review throughout 2006. The school intends to revisit both mission and philosophy statements in the normal periodic cycle of strategic planning and accreditation review.

Commendations:

The Visiting Team commends the Oak Meadow Montessori community for putting time and effort into the creation of the School's mission and its actual program. The mission statement clearly reflects the basic strands of the Montessori philosophy and all members of the community live the mission on a daily basis.

Recommendations:

None

Suggestions:

None

SECTION IV — THE SCHOOL COMMUNITY

SCHOOL CULTURE

12. The culture of the school is a reflection of the mission and philosophy of the school.

The Visiting Team was very impressed to see how the culture of the School was a reflection of the well-articulated mission and philosophy that was recently rewritten. Mission statements were posted throughout the school, all teachers spoke clearly and passionately about the mission and philosophy, students demonstrated the qualities articulated in the mission statement, and the parent programs were also in line with the mission and philosophy of the school. The Visiting Team saw “a diverse community of life-long learners” who were “confident, independent, and compassionate.”

13. The administration and faculty actively promote understanding and acceptance of the school’s culture among the students and parents.

Because the mission and philosophy are so integral to the fabric of the school, there are countless demonstrations of how the administration and faculty promote the culture of the school to both students and parents. The Visiting Team witnessed the grace and courtesy of the Oak Meadow community repeatedly in our interactions with students, parents, faculty and staff. When visiting classes, the mutual respect accorded both faculty and students was noteworthy. Teachers reinforce culturally endorsed responses in their daily interactions with students, encouraging empathy and open communication. Whether it is in a daily lesson, an interaction in the hallway, a conversation at dismissal or a parent group tour, the focus is on understanding and accepting the culture of Oak Meadow. The Visiting Team saw a great deal of pride in the school culture and an eagerness to share that with all involved or potentially involved in the school community. In talking with the Parents’ Association and reading the Self Study, the Visiting Team could see how the parent and community programs initiated by the Parents’ Association demonstrated a clear sense of the culture. The administration and faculty commendably model this understanding and appreciation of the culture by the Parents’ Association.

Commendations:

The Visiting Team was very impressed to see how the culture of Oak Meadow was a reflection of its well-articulated mission and philosophy.

Recommendations:

None

Suggestions:

None

ADMISSION AND MATRICULATION

14. The school has a clearly articulated admission program whose criteria are consistent with its mission.

Oak Meadow has clearly articulated admission policies and processes that are consistent with the mission. The admission process is clearly stated in written materials and on the newly launched website. For all applicants, the parents have an interview and tour of the School in order for the Director of Admission to share the mission and vision of the School and in order to ascertain whether the parents fully understand the mission of the School. When appropriate, applicants submit school transcripts, teacher recommendations and any neuropsychological evaluations. For the youngest students, age two to four, the Director of Admission meets with the student to see if he or she is a good candidate for the Montessori program. For the Lower Elementary candidates, students spend a morning in the Lower Elementary classroom where teachers work with the student to assess both skill level and social readiness for the Montessori program. The candidates for the Upper Elementary and Middle School spend an entire day in the classroom where teachers observe social interactions, assess skill levels, and evaluate student responses to the Montessori materials and methods. At the end of the visits, the teacher completes a written evaluation that becomes a part of the applicant's file and is reviewed as a part of the admission process. This part of the process is in line with the mission of the school because it allows for close examination of whether the students possess both the skills and readiness for the specific program to which they are applying. The role of the teachers and the student visit in the admission process is critical to the appropriateness of the admission process as it relates to the mission of the school. In addition to these elements of the admission process, diversity, an important component of the mission, is addressed in the decision-making process. While Oak Meadow would love to have more students of color, they are limited by the diversity of the local population. They do, however, look to accept students of color whenever they have appropriate candidates. The Visiting Team was impressed with the diversity of the School, given its location.

A challenge for Oak Meadow is that people are looking into the school for their children for very different reasons: for a quality early childhood program, for a private school alternative, or for a Montessori program. Therefore, the messaging, both in the admission process and subsequently, often needs to be tailored to the specific audiences. For example, often parents looking into the Children's House program are looking for a strong early childhood program for their child to attend until the quality public school program begins in their town. The Admission office has the challenge of attracting families for whom the complete Montessori program is what they want, or trying to retain families for whom Montessori education was not initially their first priority. Similarly, in the Self Study there are concerns about the students leaving after the Upper Elementary program and not staying for the Middle School. The Middle School program is strong and compelling. The challenge is communicating to the internal community as well as the

external community about the benefits of an Oak Meadow Middle School Program. The Visiting Team suggests that Oak Meadow explore issues related to retention, including who should be responsible for addressing these issues where appropriate.

The new data base in the Admission Office should help the Director of Admission communicate with families, streamline work load, and track admission trends and statistics.

15. Admission procedures and criteria are clearly and accurately communicated to prospective candidates and their families.

The Admission procedures and criteria are very clearly communicated to prospective candidates and their families in paper and on line publications as well as in person during the Open House and parent tour and interview.

16. The school communicates in writing, prior to the enrollment of the student, the financial obligations of the parent or guardian.

The School does a good job of communicating the financial obligations of the parent/guardian in writing prior to enrollment. They address the parent/guardian financial obligation in the Oak Meadow admission brochure and website. These obligations are also addressed in person in the interview with the parents/guardians.

17. The school has a process in place to meet the needs of new students and their families.

Oak Meadow does a nice job of integrating new students and families into their community. They provide a number of methods for new students and families to interact with current families: the End of School Picnic, the Host Family Program which helps to arrange play dates between returning and new students, the Beginning of Year Picnic, Fall Festival, Parent Orientation Nights, Curriculum nights, and peer mentors for the students once they matriculate.

Commendations:

The Visiting Team was impressed with the diversity of the School, given its location.

The Visiting Team commends Oak Meadow for integrating new students and families into their community.

Recommendations:

None

Suggestions:

The Visiting Team suggests that Oak Meadow explore issues related to retention, including who should be responsible for addressing these issues where appropriate.

COMMUNICATIONS

18. *The school provides information about its programs and procedures to its constituencies.*

Oak Meadow has a number of methods they use to provide information about their programs and procedures to their constituents. The admission materials and website provide written communication about programs offered at Oak Meadow to prospective families. Other written information for families include monthly classroom newsletters, *Highlights*, the School's weekly newsletter, The Parent Handbook, and a newly expanded and improved website. Oak Meadow does a commendable job providing multiple opportunities to share information with parents about program and procedures. These include, but are not limited to, Parent Education Nights, observation days, parent coffees, and other more informal gatherings. With the new database for admissions and development, email blasts will be a new form of communication for the School to utilize.

19. *The school has established means for providing information to parents/guardians concerning the progress and growth of their children.*

Oak Meadow has formal ways of communicating student progress and growth through parent/teacher conferences and written progress reports. These both occur two times a year and the written progress reports precede the parent/teacher conferences. Children's House parents receive written progress reports prior to the November and March parent/teacher conferences. Lower and Upper Elementary parents receive written progress reports prior to the November and May parent/teacher conferences. Middle School parents receive written progress reports prior to the November and March parent/teacher conferences. The Visiting Team noticed that the Children's House and Middle School parents don't have a formal communication from teachers regarding student progress after March. The Team suggests the Assistant Head and Team Leaders consider end of the year reports, specifically for transition years (i.e., from Children's House to Lower Elementary, Lower Elementary to Upper Elementary, Upper Elementary to Middle School and then at the end of Middle School). There are many informal means of learning about student progress that include opportunities to talk with teachers at school-sponsored functions. When there are concerns about student progress at non-reporting times, there are appropriate vehicles for support and communication with parents through email, additional conferences, meetings with teachers and the Assistant Head when appropriate. While the systems for reporting progress seem to be working for the School, the Team encourages the administration and Team Leaders to review the annual timing of written progress reports and conferences. By doing this, the School can explore balancing both the work load on faculty and the integration of new information in communications.

20. The school has established means for families to express their own concerns and interests to the appropriate school personnel.

It is very clear to families that they can express their concerns/interests and to whom they should address those concerns/interests. Depending on the topic of interest or concern, families can speak with the classroom teacher, lead teacher, Assistant Head or Head, when appropriate. They can also express concerns/interests to the Parents' Association or Board of Trustees if that is appropriate. The Parent Handbook helps to clarify the proper protocol for communication.

21. The school has a process for providing information to alumni/ae and past parents.

Oak Meadow has just recently begun to “tap” their alumni/ae and past parents. In the past four years they have begun an annual fund that is now raising approximately \$60,000. They have hired a person, part of whose job is to address alumni relations, and they have recently added a database for the Development Office. These are all good first steps. However, the Visiting Team questioned the adequacy of the process without a clearly defined communication strategy currently or for the future. The Team recommends the School create a comprehensive plan outlining how to communicate effectively and proactively with current and future alumni and past parents.

22. The school works to build a positive relationship with the local community in which it is located.

There are a number of ways that the School works positively with the local community through work with the Food Project, visiting a local elderly care facility, hosting a coat drive to distribute to local families in need, and providing holiday baskets for local grocery stores. In addition to this, the Head of School has made connections with local schools and meets with them to share information. The Visiting Team suggests that more attention be spent on how to build other relationships with the local community in order to educate them about what wonderful things are happening at Oak Meadow.

Commendations:

Oak Meadow does a commendable job providing multiple opportunities to share information with parents about program and procedures.

Recommendations:

The Team recommends the School create a comprehensive plan outlining how to communicate effectively and proactively with current and future alumni and past parents. (Rec. #6)

Suggestions:

The Team suggests the Assistant Head and Team Leaders consider end of the year reports, specifically for transition years: ie: from Children's House to Lower Elementary, Lower Elementary to Upper Elementary, Upper Elementary to Middle School and then at the end of Middle School.

While the systems for reporting progress seem to be working for the School, the Team encourages the administration and Team Leaders to review the annual timing of written progress reports and conferences. By doing this, the School can explore balancing both the work load on faculty and the integration of new information in communications.

The Visiting Team suggests that more attention be spent on how to build other relationships with the local community in order to educate them about what wonderful things are happening at Oak Meadow.

RECORD KEEPING

23. The school maintains complete and accurate records on all present and former students and their families, and these records are secure and available only to authorized individuals.

The School maintains complete and accurate records on all present and former students and their families. They are appropriately secured and are available upon request.

Commendations:

None

Recommendations:

None

Suggestions:

None

SECTION V — PROFESSIONAL STAFF

COMPOSITION

24. *Faculty, administrators and support staff are sufficient in number to carry out the program of the school and to provide for the needs of the school's constituents.*

Oak Meadow has a sufficient number of faculty, administration and staff to meet its core needs and to offer a high quality Montessori program on all levels. Teaching and support positions have been added as needed in recent years. Additional administrative personnel have been hired in order to energize and coordinate the School's development program, enhance parent and alumni relations, direct the After-School program, and support the School in meeting its technology needs.

The Visiting Team concurs with the School in its assessment that further personnel are needed to maintain and sustain connections with alumni and alumni parents, and to provide nursing care during the after school hours.

One area of teacher concern is that of adequately supporting children who have special learning needs. The School may want to examine the possibility of hiring a resource teacher to further support the success of these children and to anticipate the needs of others who may enroll in the future. This would support the School's desire, as per its mission statement, to enroll and support "a diverse community of learners" while responding to the needs of teachers for more focused support for those with special needs.

25. MAJOR STANDARD

Faculty, administrators, and support staff are well suited to their specific responsibilities by training, background, and/or experience.

The Visiting Team verified that the School makes every effort to hire and retain trained Montessori teachers at every level and for every classroom. This supports the actualization of the School's mission to offer child-centered education in keeping with the tenets of the Montessori philosophy. The School is proactive in maintaining a full cadre of trained Montessori teachers, sending qualified individuals to teacher training when the opportunity or need arises. Oak Meadow works hard to retain these professionals through salary increases and close attention to each teachers' professional development plan, thus maintaining continuity in the School's program. The consistently high level of teacher preparedness supports the high quality of classroom environments in evidence at the School, as well as the quality of teacher-child interactions the team experienced throughout the school.

The administrative team, as a whole, functions both cooperatively and effectively to support the overall mission of the School. The School has grown in both size and institutional maturity over the past several years. As a result key administrative positions have been added in order to strengthen the School's administrative infrastructure and support its financial and communications goals.

The Visiting Team suggests that the school continue to define the scope and responsibilities of these positions. Using the Development Office as an example, additional training for key staff as well as a narrowing of the scope of this position would be advantageous.

One area of concern is the lack of cross-training in administrative functions, particularly in the Business Office. There is only one person who handles the School accounts, so the Business Office financial functions are not performed if that individual is out for any length of time. It is recommended that the School examine the need to cross-train staff in key positions, particularly those related to the Business Office.

Commendations:

The Visiting Team commends the School for its efforts to hire and retain trained Montessori teachers at every level and for every classroom. This supports the actualization of the School's mission to offer child-centered education in keeping with the tenets of the Montessori philosophy.

The Visiting Team commends the Head of School for adding key administrative positions in order to strengthen the School's administrative infrastructure and support its financial and communications goals.

Recommendation:

The Visiting Team recommends that the Head and Assistant Head of School examine the need to cross-train staff in key positions, particularly positions related to Business Office function. (Rec. #8)

Suggestion:

The Visiting Team suggests that the School continue to define the scope and responsibilities of newly created administrative positions. Using the Development Office as an example, additional training for key staff as well as a narrowing of the scope of this position would be advantageous.

The Visiting Team suggests the school may want to examine the possibility of hiring a resource teacher to further support the success of children with special needs.

PROFESSIONAL DEVELOPMENT

26. MAJOR STANDARD

All faculty, administration and staff participate in a clearly defined program for professional growth.

Oak Meadow Montessori School offers an exemplary and robust professional development program for its teaching and administrative staffs. The school offers many opportunities to attend trainings and conferences and to observe in colleagues' classrooms, both in-house and externally. Workshops are brought in to the School on a regular basis in order to stimulate teachers toward best practices in Montessori education. The School has made the professional development of its teaching and administrative staffs a high priority, increasing budget monies toward this end and even paying professional dues for its teaching staff. The Visiting Team applauds the School for its strong commitment to professional training and development. This priority supports the School's mission to foster "personal growth" in a community of "lifelong learners."

Staff satisfaction was measured through use of a Professional Development Survey, which was developed in-house. Survey results indicate that teachers are quite satisfied with the opportunities offered by the School.

The School has developed and implemented a consistent process for professional growth, called Professional Growth Plans. These were created to define professional standards for faculty and to provide a blueprint for creating and reaching professional development goals. PGP's are used to develop yearly goals, which are monitored and supported by administration.

Commendations:

The Visiting Team commends Oak Meadow Montessori School for its strong commitment to professional training and development for faculty and administration. This priority supports the School's mission of fostering "personal growth" in a community of "lifelong learners."

The Visiting Team commends the Head and Assistant Head of School for implementing a consistent process for professional growth, through Professional Growth Plans.

SUPERVISION AND EVALUATION

27. MAJOR STANDARD

The school has a clearly defined and implemented program for supervision and evaluation of faculty, administration and support staff performance.

The School has adapted a process of supervision and evaluation that supports its mission of supporting personal growth, lifelong learning, and individual responsibility. Responsibility for identifying areas for growth and goal-setting lies largely in the hands of the individual, with the exception of those cases in which the Head or Assistant Head feel that an individual needs to work toward competence or professionalism in a given area.

In the past, information regarding the process of professional evaluation has been passed on via “cultural osmosis” or word of mouth. It is highly important for the School to formalize the process of staff evaluation through proposed revision of the Faculty Handbook as well as other types of written communication. At this point there is no routine written feedback from the Head or Assistant Head of School to the employee as an outcome of the evaluation process (the exception being that documentation is maintained and filed in cases where remediation is required). The School may wish to create a system of written feedback for employees as an outcome of the evaluation process; this feedback should be given to the employee and stored in personnel records.

Commendation:

The Visiting Team commends the School for adapting a process of supervision and evaluation that supports its mission of supporting personal growth, lifelong learning, and individual responsibility.

Recommendation:

The Visiting Team recommends that the Head and Assistant Head of School formalize the process of staff evaluation through proposed revision of the Faculty Handbook as well as other types of written communication. (Rec. #3)

Suggestion:

The Visiting Team suggests the Head of School may wish to create a system of written feedback for employees as an outcome of the evaluation process; this feedback should be given to the employee and stored in personnel records.

DECISION MAKING

28. *The processes for decision making are articulated and clearly understood.*

Oak Meadow's decision making process is inclusive, collaborative, flexible, responsive, conclusive and productive. Faculty and staff feel ownership and investment in the decisions. Examples are the process that the School used for the development of its strategic plan and its approach to creating the AISNE Self Study. In both of these instances, individuals from all parts of the School community were included and took ownership throughout.

The School community is relatively close and some communication systems are informal. Within this framework, newcomers can feel left out until roles and decision making processes are defined. The proposed new Employee Handbook may help to define and communicate the School's decision making processes to faculty and staff.

Commendations:

The Visiting Team commends the School for its decision making process which is inclusive, collaborative, flexible, responsive, conclusive and productive.

Recommendations:

None

Suggestions:

The Visiting Team suggests the proposed new Employee Handbook might include and define the school's decision making processes.

FOR SCHOOLS WITH INTERNSHIP/APPRENTICE TEACHING PROGRAMS

29. *The school's Internship/Apprentice Teaching program is consistent with the School's mission.*

The School does not have an Internship/Apprentice Teaching program.

SECTION VI — PROGRAM

CURRICULUM AND INSTRUCTION

30. MAJOR STANDARD

The school's curriculum is congruent with its stated mission and philosophy and stems from a set of guiding beliefs.

It is clear that Oak Meadow Montessori School has a strong set of beliefs about their path of education. Their mission statement declares they are “dedicated to the child-centered Montessori philosophy”. This is visible throughout each and every classroom. The child-centered component, which is the corner stone of the Montessori philosophy, is found at every level. The teachers use their Montessori albums to guide their lesson choices. All subjects are taught based on the child’s ability and interest. The curriculum is presented in ways to foster choices the child may use approaching the work. The materials and activities allow for multiple practice of each lesson or concept, giving the child the time to internalize the lessons at hand. Assessment of each student drives the teaching methods in order to meet each child’s learning needs. The lessons and materials are varied to accommodate the different learning styles and interests.

The Oak Meadow Montessori School’s choice of teaching strategies is reflective of their dedication to the Montessori philosophy. In every classroom the Visiting Team observed individualized instruction, small group lessons, materials that are age appropriate, many children using self directed learning, multi-age groupings, a strong emphasis on community values, and cooperation and collaboration among students as well as students and teachers.

The goals of Oak Meadow are stated clearly as Cognitive, Social and Emotional. The needs of each student are being met in the school’s dedication to seeing the “whole child” and working with each child on their particular needs.

31. MAJOR STANDARD

The faculty and administration have a consistent process by which they regularly review, appraise, and revise the educational program.

The faculty and administration have a consistent process by which they regularly review, appraise, and revise the educational program.

Until recently, curriculum review and appraisal had been done on an informal basis at Oak Meadow. The School’s recent focus on the AISNE Self Study brought faculty together for the purpose of such analysis. Team leaders meet on a regular (monthly) basis, and discussion of curriculum is one among many other topics at these meetings.

There is a need to create a plan by which teachers from each level will create a schedule and process by which regular curriculum review can be accomplished. In addition, the School would benefit from the oversight of a curriculum coordinator who is qualified to support systematic implementation of curriculum decisions on all levels.

32. The school documents curriculum in each area of learning.

Through the AISNE Self Study, the school's faculty looked at and documented all of their curriculum areas. This document is very clear and concise and makes a very strong effort in tying their curriculum standards to the Montessori philosophy.

33. The documented curriculum reflects appropriate continuity and sequence across the grades and divisions.

Team leaders review their level's curriculum and plan the year before the new school year starts. They hold regular level meetings in which they discuss planning issues. However, the Visiting Team did not see evidence of continuity and sequence across the school's levels, other than the general Scope and Sequence continuity, which does not ensure seamlessness. Teachers expressed their willingness to work on more specific exit/entry criteria for each level. The Visiting Team recommends that the Elementary staff revisit the curriculum horizontally and vertically to ensure that all areas are addressed in depth, with seamless, consistent transition between levels. The Visiting Team suggests that there be regular cross-level meetings of teachers and team leaders to discuss their curricula.

34. The program content and methods are sufficiently varied to accommodate the school's range of student learning styles and interests.

The School's program content and methods accommodate a variety of student learning styles and interests. Oak Meadow has used the Montessori philosophy at its best by providing many different materials and activities to meet a large array of learning modes and interests. The core Montessori materials, supplemented by those of teacher design, offer an extensive array of possibilities and choices intended to reach varied modalities and learning styles. For example, many materials are multi-sensory in nature and involve movement on the part of the child, who is an active participant in the learning process. Variations and extensions (varied uses) of materials on all levels offer the opportunity for students to extend work to their own level of comprehension and satisfaction. Math concepts are offered in a variety of ways and through a variety of materials over time, enabling the student to view and experience a concept in multiple ways. In the Elementary program, "big picture" presentations of cultural subjects invite the child to do in-depth research on aspects of particular interest.

Students work at tables, on the floor, sitting in the hallways, together, and alone. Those who need study carrels are provided them. Teachers have the freedom to deliver curriculum in the way(s) best suited to each child (small group lessons vs. individual; use

of more or less language with a particular lesson; use of supplementary or non-Montessori materials to further flesh out a concept).

The Visiting Team observed a wide range of activities in all curriculum areas, and at all levels, verifying that children are in fact learning in multiple ways through varied methods and materials. In the Children's House, students put together puzzle maps of the continents and worked with the squares and cubes of numbers using bead chains. Elementary students studied the continents with pin maps or used the puzzle maps to make elaborate paper maps which they could color with watercolors or colored pencils, and label in a variety of ways. Upper Elementary students studied negative numbers with a number board allowing them to see the logic of calculations. Middle School students graphed the squares of numbers to create formulas for deriving the squares abstractly.

35. The school uses assessment of student needs and student progress in planning classroom instruction.

Teachers at Oak Meadow observe their students on a daily basis. They follow each child closely and keep anecdotal notes that drive the instruction. The Montessori Curriculum is child-centered, allowing each student to progress and move at his/her own pace. The teachers are constantly in a cycle of observation, keeping track of the work a student completes, or needs help completing independently, in order to plan their next presentation.

While the program content and methods can accommodate the students' learning styles to a great extent, staff members articulated the desire for more support in the area of learning disabilities, pointing to the need for a Special Education tutor to work with students whose learning styles are outside the normal range, and to collaborate with their teachers to provide more effective instruction.

36. The school incorporates diversity in the development of content, pedagogy, and assessment as appropriate to its mission and philosophy.

Oak Meadow incorporates diversity in the development of content, pedagogy, and assessment as appropriate to its mission and philosophy. The entire curriculum incorporates diversity and allows teachers to plan a plethora of lessons that expose their students to various perspectives and aspects of the human experience (for example, the needs of man lessons in the elementary curriculum). At Oak Meadow the extent to which this is done seems to be dependent upon each teacher's interest and initiative. Diversity is integrated in every aspect of the program, in the prepared environment, materials used, and library books.

The Academic Program (with embedded suggestions)**MATH:**

The math curriculum is a very dynamic part of the school's classrooms. The materials are vibrant, welcoming and consistent from level to level. Each classroom is equipped with the math materials to allow children to learn many different concepts at many different levels. The math curriculum is consistent between level classrooms and spirals back to ensure understanding.

In children's House the children are clearly engaged in many different math concepts with the use of many different materials and activities. Children were engaged with their math work within an environment that encourages discussion and collaboration. Many "math" ideas were being debated and discussed among children helping them not only solidify their understanding of the concept at hand but also use real life problem solving skills.

In Lower Elementary, it was clear that the math curriculum and materials build off the child's experience from Children's House. The children observed were independently working on various skills with materials that had them engaged and excited. The sequence of lessons between the different age levels was seamless, as the Visiting Team could not distinguish grade levels based on the math being explored. The teacher's success is demonstrated in meeting each student at his/her individual ability and skill level.

In Upper Elementary, the team observed a smooth transition from LE to UE. There were materials that were identical to those found in the lower level. Children were using materials as well as moving to a more abstract form. Materials were available to allow for pre-algebra concepts. One Upper Elementary teacher was responsible for introducing algebra concepts in the abstract form allowing the students to get ready for their transition to Middle school.

In Middle School, math materials were observed that were consistent with the previous levels. Students are encouraged to solidify their understanding using these materials, than were moved onto more abstract thinking. Concepts were introduced in a whole class setting, but a smaller number of students would allow for closer evaluation of each child's work and understanding.

LANGUAGE:

The language curriculum is a dynamic presence in all classrooms and through all levels. Classrooms display a fairly comprehensive range of age-appropriate materials; their use was in evidence in most classrooms during the Team's visit.

In Children's House, the children are appropriately engaged in oral language activities, pre-writing and writing activities, and exercises that promote phonemic awareness. These isolated activities are knitted together in an organic whole through meaningful use of language in conversation, book sharing, and circle activities.

In Lower Elementary, children are moving on from the foundation built in the Children's House. Having internalized core phonemic awareness skills as well as understanding of the reading/writing process, children move on to small reading groups, writing for real purposes (e.g., journal writing), word study, parts of speech, and spelling lessons. While the Team consistently observed language activity occurring in Lower Elementary classrooms, there remains a concern that the Lower Elementary hasn't articulated a comprehensive language program, nor has it comprehensively described its scope and sequence.

In Upper Elementary, the goals as stated in the Self Study are to move children more deeply into reading comprehension through literature discussion, and to broaden and elaborate writing skills through daily writers' workshop, poetry and creative writing, and to use acquired language skills to forward individual research projects. While these are commendable and appropriate goals, the Visiting Team observed only sustained silent reading and a lesson involving paraphrasing as specific Upper Elementary language activities. Materials on classroom shelves offered evidence that the full spectrum of language is being explored.

In Middle School, the closely articulated scope and sequence of the curriculum and well-defined outcomes demonstrate a commitment to developing articulate, skilled students who can speak, read, and write in a wide variety of genres.

Students build on the skills developed in the Elementary years as they analyze literature, write creatively, develop oral and written reports, and read and write for real purposes. The Team observed students demonstrating a wide variety of language skills in both practical and academic work. Students used recipes, constructed grocery lists, and negotiated work groups. Literature studies are integrated with work in the Cultural studies. The Visiting Team observed a literature group as students planned the papers they were to write, referring to the text to support statements made during discussion, clarifying vocabulary, and refining the focus of the papers.

CULTURAL:

All the classrooms at Oak Meadow display cultural materials. There is evidence of work based on the fundamental needs of humans, life science, physical science, earth science, and earth history as well as cultural and economic geography. The Team recognizes that in a Montessori school, cultural studies are a vivifying and important part of the curriculum. The Team is aware that these studies should be the driving force in Montessori Elementary and Middle School levels, providing the vehicle for research which leads to authentic opportunities for reading, writing, speaking, and other

expressions of student learning. On the elementary level cultural studies appeared to be tangential to the math and language work.

Also, the Team observed that while each level had a cultural component woven into the classroom, there is a lack of continuity between levels. For example, the decision as to what country to study or what science experiment to conduct is based on the level's ideas and does not apparently connect to studies in previous or future levels. The Visiting Team suggests that Lower Elementary and Upper Elementary assess and develop their cultural curriculum so that each class has a full complement of materials needed to provide the cosmic curriculum and support the children's research projects that follow on the Great Lessons and Key Lessons.

In Children's House, children were observed caring for plants, recording weather patterns, working on maps, and exploring the solar system. Children were learning the fundamental needs of man by caring for each other (and for the Visiting Team!). They tended to their gardens, graphed the seeds in the pumpkins they had grown, and learned nomenclature for parts of animals. Children used the Peace Rose to help them resolve conflicts.

In Lower Elementary, children were observed working on parts of vertebrates, making booklets, and constructing posters to record their learning. A variety of maps were in progress. Nicely completed maps and artistic interpretations of the Big Bang were on display.

In Upper Elementary, children were observed in a very interactive science lesson that involved the scientific process of variables. The children were being asked to stretch their minds with a lesson that appeared to have a future independent and group component. All though the Visiting Team did not observe other cultural lessons, their schedule indicates that students meet once a week for science, history, geography and two cultural work periods. It would benefit the UE level to work more closely with the Middle School and Lower Elementary to ensure a flow of these studies.

In Middle School, cultural program is very well defined and integrated into the other subjects being explored. The teachers recognize that there are still some ways to better ensure the connection between their science and history subjects. The students' understanding of economics is strengthened through their work on a fund raising project in which they advertise, market, deliver a product, reflect on the project, and utilize the profits for charity work and field trips.

PRACTICAL LIFE:

The Visiting Team observed ample evidence that practical life is a central part of the curriculum throughout the levels. This focus was in particular evidence in the Children's House and Middle School classrooms.

In Children's House, the most striking example of the integrated practical life curriculum take the form of numerous grace and courtesy lessons observed by the Visiting Team. Children greeted the visitors with friendliness, handshakes, and offers of snacks. Even in non-scripted moments, the children were courteous, friendly and poised, all evidence of the peaceful, respectful environments in which they learn. Each Children's House classroom exhibited a well organized and richly varied array of everyday living materials.

In Lower and Upper Elementary, the children are expected to be self-organizing in terms of completing and organizing tasks. In addition, they are responsible for creating many of the rules that govern their daily lives. Other more overt practical life activities such as field trip planning, first aid, woodworking, sewing, etc. were not in evidence. It is possible that this area is more clearly articulated on the Elementary levels than was observed by the Visiting Team, if not, the Elementary teachers may wish to re-examine practical life as a priority in their curricula.

In Middle School, through service to the community, values development, and the operation of small businesses (e.g., "The Middle School Café"), the students demonstrate that practical life skills learned in earlier levels have now been incorporated into the fabric of their lives. These students use practical life activities as a way to express and further develop themselves as contributing human beings.

SENSORIAL:

At Oak Meadow, the sensorial classroom area is in most evidence at the Children's House level. This is typical in all Montessori schools, as the sensorial area relates to the refinement of the senses and to laying the foundation for further cognitive development.

In Children's House, each classroom has a full array of traditional Montessori sensorial materials in addition to enrichment materials that have been created by individual teachers. The Visiting Team observed active engagement with sensorial activities in many Children's House classrooms.

In Lower and Upper Elementary, sensorial work is in evidence through students' accurate and detailed observations of the natural world as part of the science curriculum or as part of cultural lessons (smelling, tasting, etc.). The students may refer back to prior sensorial experiences through the study of algebra (binomial and trinomial cubes).

In Middle School, students have moved on to the abstract level of concept development. Their sensorial experiences are largely incorporated into their daily living experiences, for example cooking and silent meditation.

ART, MUSIC, DRAMA, PHYSICAL EDUCATION, SPANISH:

The Oak Meadow School has made a strong commitment to the arts and fitness for their student body. All children in the school are offered time in music, art and physical education. The Upper Elementary and Middle School also participate in drama. The programs are led by teachers who are each passionate about their area of expertise and share their enthusiasm with their students. Many of the teachers spoke of themes in their approach to their lessons. The Team suggests that each specialist be included in the regular planned curriculum meeting to see if there is a way to connect what is being studied in the classroom with what happens in these specials. Some teachers worked closely in the Montessori model of multiply-age groupings where others break down their class by grade. The Team suggests reviewing the strategies of these various groupings.

Art: The program uses a clear art curriculum called “Teaching for Artistic Behavior” that allows the children to learn a skill and then use it on self-promoted projects. The Team observed children clearly engaged in their work. The art teacher provided group as well as one-on-one instruction, and was able to provide the materials needed to create the project. The classroom had a real “Montessori” feel.

Music: The music program is dedicated to providing a Montessori approach to music lessons. The teaching is done in multi-age groups when available. The Elementary and Middle School students are part of instrumental lessons that are conducted by grade level and allows for development of skill at each level. The program is clearly dedicated to giving the children as much exposure and opportunity to music as possible.

Drama: The drama’s curriculum appears to be an extension of what the Montessori philosophy of educating the whole child. The relaxation, concentration and imagination exercises are a nice connection to the early level’s emphasis on reflection, peace, and self-awareness. The program appears to allow for children to find another avenue to express their ideas and feelings.

Physical Education: The school has made a strong commitment to physical education as evident through the amount of time allotted to the students. The PE program appears to be based on physical fitness and skill development. The children observed appeared to be excited, part of the process of establishing the rules, and allowed to express their energy.

Spanish: The school employs two part time Spanish teachers. One works with the Children’s House and Lower Elementary students and one with the Upper Elementary and Middle School students. The two teachers are meeting regularly and have aligned their curricula. They use music and movement to introduce vocabulary, teacher-made and purchased materials to support instruction, and TPR theories to guide their instruction. The Spanish teachers expressed the need to be included in team meetings in order to better collaborate with classroom teachers in terms of preparing their curricula.

Commendations:

The Visiting Team commends Oak Meadow School for its strong connection between their philosophy and their curriculum.

The Visiting Team commends the Middle School for a thorough analysis of their curriculum as well as high level, closely articulated outcomes.

The Oak Meadow specialist staff is commended on their commitment and enthusiasm for their subject, as well as their strong connection to the school's mission to educate the whole child.

The Visiting Team commends Oak Meadow for its broad range of practical life activities, which foster the development of the whole child at each age level.

The Visiting Team commends the school for its language program that is congruent with its mission in developing articulate, skilled students who can speak, read, and write in a variety of genres.

The Visiting Team commends Oak Meadow for the depth of its math curriculum, and for the confidence and enthusiasm with which children at all levels explore math concepts, building patterns and rules from their experiences.

The Oak Meadow School should be commended on their ability to meet each child where they are, assessing their skills on a daily basis while matching the curriculum with their needs.

Recommendations:

The Visiting Team recommends that the Elementary staff revisit the curriculum horizontally and vertically to ensure that all areas are addressed in depth, with seamless, consistent transition between levels. (Rec. #4)

The Visiting Team recommends that the School create a schedule and process by which regular curriculum review can be accomplished. (Rec. #5)

Suggestions:

The Visiting Team suggests that there be regular cross-level meetings of teachers and team leaders to discuss their curricula.

The Team suggests that each specialist be included in the regular planned curriculum meeting to see if there is a way to connect what is being studied in the classroom with what happens in these specials.

The Team suggests taking another look at the grade breakdowns versus multi-age grouping and what is best to support the school's philosophy.

To ensure continuity across the levels and classrooms, the Visiting Team suggests annual re-evaluation of how multi-culturalism is addressed in each class.

PROGRAM RESOURCES

37. Instructional facilities, which include classroom space and furnishings, are appropriate and conducive to learning at each level.

Classroom space and furnishings at Oak Meadow are consistently appropriate and conducive to learning at each level. Each classroom contains attractive, well-constructed places that facilitate the children's independence, work, and social activities.

Desks, tables, and chairs are proportionately sized for the children in each environment from Children's House to Middle School and easily moved by the students as their activities change. There are sofas, floor pillows, easy chairs, window seats, and rocking chairs invite children to talk, read, reflect, and work collaboratively.

Wooden shelves attractively display materials and artifacts. Display tables contain objects from nature such as huge sunflower heads grown in the class garden, results of science experiments done at home, and souvenirs from trips. Books are attractively arranged near pillows. Posters, children's maps and poems, and framed art work—some by students, and some by more famous artists—hang on the walls.

The well-designed environments foster respect and concentrated learning.

38. The school provides sufficient instructional materials to support its program.

Each classroom is supplied with attractive materials in good condition, varying according to the developmental level of each age group. In Middle School, materials foster abstract thinking as well as practical life activities. Science supplies, textbooks, reference works, cooking equipment, and art materials are readily available. In Upper Elementary a full range of advanced Montessori math materials supports the students' work with decimals, negative numbers, and calculation of volume and square area. In Lower Elementary the Montessori grammar materials, test tube division, and bead frames are eagerly used. Each Children's House classroom contains a full range of attractive, appropriate materials for practical life, sensorial, geometry, language, math, geography, art, and science.

The Specialists' programs are furnished with the materials needed to offer hands-on experiences in music, art, physical education, technology, and Spanish.

39. The school uses technology in a way that is congruent to its mission.

The School uses technology in a way that is congruent to its mission. Oak Meadow believes that children learn through direct experience, and should not be exposed too early to computers, nor should technology substitute for real experience.

The school is clear in its position that since “the hand brings knowledge to the mind,” direct experience is critical to the development of young children, and computers are not appropriate for them. Therefore, there are no computers in the Children’s House.

Beginning in third grade, students have technology lessons that focus on keyboarding skills. As the children become older, the computer is used for word processing, and to access the internet for information which cannot be obtained in more immediate ways, such as through direct observation or through other media. Middle School students use Power Point and other programs to present and enhance their work.

40. The school’s library and its technological resources are integrated into the curriculum and provide students with appropriate experiences in reading and research.

Oak Meadow uses the school’s library to help integrate their studies. They use age appropriate methods to include reading and research into each level.

Commendations:

The Visiting Team commends Oak Meadow for holding true to its belief that children learn through direct experience, and should not be exposed too early to computers, and technology should not substitute for real experience.

Suggestions:

The Visiting Team suggests increasing the size of the nonfiction collections in classroom libraries and in the main library.

STUDENT LIFE

41. MAJOR STANDARD

The school provides a safe and healthy environment for living and learning.

Oak Meadow is conscious of its responsibility for the safety and health of the school community. Arrival and dismissal are carefully configured for the safety of all, and closely supervised by staff. Practical life and other activities that require tools are structured so that children are taught proper use, and monitored appropriately. Tools are stored safely. In physical education the children are reminded of how to move for the safety of all. Students feel comfortable with the full time school nurse who is readily available in her welcoming and centrally located Health room. The school has an overall atmosphere of attention to health and safety while not compromising dynamic living and learning.

42. The school's annual calendar and daily schedule are planned to provide for the total program of the school.

The School's annual calendar details the schedule for a rich variety of activities for the school community including teas, parent conferences, parent education, field trips, family events, and the annual science fair and art show.

The daily schedule is configured to allow as much as possible for uninterrupted blocks of work time, while still accommodating the school's commitment to providing specialists' programs.

43. The school has appropriate resources to help faculty identify and meet individual student's needs.

Teachers at Oak Meadow use observation of students' behaviors and activities, as well as conversations with them, to deeply understand students' needs. To meet those needs, teachers utilize the wide variety of Montessori materials and a flexible approach to guide children in their growth. They consult regularly with one another during level meetings about children who need additional help.

Staff members articulated the desire for more support in the area of learning differences, pointing to the need for a special education tutor to work with students whose learning needs are outside the normal range, and to collaborate with their teachers to provide more effective instruction. The school does employ a part-time school psychologist who observes students and supports teachers. If a student needs testing of any variety, the school has an appropriate system by which to make such a suggestion or request.

Suggestions:

The Visiting Team suggests that the school, with guidance from the consulting psychologist, explore ways to increase support for staff regarding student learning differences.

EXTRACURRICULAR, CO-CURRICULAR, AND ANCILLARY PROGRAMS

44. The school's extracurricular, co-curricular, and ancillary programs are congruent with its mission and philosophy and are appropriately organized, supplied, and staffed.

Oak Meadow has various extracurricular, co-curricular, and ancillary programs. They are congruent with the school's mission, as they encourage the students to make decisions and they promote cultural awareness. All the programs meet local guidelines in terms of safety, requiring CORI checks and insurance regulations.

Programs include:

1. Community service across the levels of the school. The school participates in, among others, Toys for Tots, milk sales to benefit the Manjuree Vidappith Orphanage in India, and pizza sales. Fundraising profits are used to subsidize class trips and benefit charitable organizations.
2. Outdoor Education projects, including a trip to Nature's Classroom, planting seeds, and participating in the Food Project.
3. Monday Meeting (a community builder), Science Fair and Travel programs (UN, New York) are well received. Finally, the Middle School students visit places related to their studies from the year.

The school offers before- and after-care programs. The programs are child-centered and staffed by Oak Meadow teachers, middle school students, and local high school students. A director oversees the staff and makes sure that the program is well organized and runs smoothly. In addition to its after school drop-off program, the school offers after school enrichment programs, including soccer, karate, yoga, construction, and Mandarin Chinese. Fun Days is a program that runs during February and April vacation, and summer camp runs in two one-week sessions in June.

The Visiting Team commends Oak Meadow for hiring a coordinator for its after-school program and for offering various enrichment options to students that are consistent with the school's vision. Finally, the team acknowledges the fact that the school's after-school enrichment program is an additional source of revenue for the school.

Commendations:

The Visiting Team commends Oak Meadow for hiring a coordinator for its after-school program and for offering various enrichment options to students that are consistent with the school's vision.

RESIDENTIAL PROGRAM

The Oak Meadow School does not have a residential program.

SECTION VII — GOVERNANCE

ORGANIZATION OF THE GOVERNING BOARD

47. *The governing board is organized to carry out the mission of the school in accordance with the by-laws of the corporation.*

The Board of Trustees is organized to carry out the mission of the school in accordance with the by-laws of the corporation. The Board is sufficient in numbers and in its committee structure for this purpose as well. The Visiting Team heard clearly that the Board is satisfied with its structure, has grown over the years into an organization that operates efficiently, and is clear about its role in the community. Members of the Board reflected upon how the Board has changed over to years to one in which committees are entrusted to deal with particular issues and then present their findings to the entire Board. In that manner, each Board member no longer has to be present for each aspect of research and discussion on an issue, but can listen to the committees' summaries and vote accordingly. The Board has become more efficient as it has grown and matured. The Visiting Team was particularly impressed with the dedication and involvement of each member of the Board of Trustees; clearly they understand the school, its past, its present issues, and its needs for the future.

48. *MAJOR STANDARD*

The governing board is responsible for and has adequate procedures for oversight of major school policies which ensure the stability of the school.

The Board of Trustees exhibits a great deal of commitment to their role as overseers of the major school policies specifically to ensure the stability of the school. They ensure that the mission statement and its goals are guiding their actions as they take care to keep current on the quality of the educational program, the physical plant, and the school's financial stability. Also, the Board established a strategic planning committee to address both short and long-range plans.

The Visiting Team was pleased to see the creation of the position of Director of Development and Parent Relations but has concerns, described below in Section VIII, Standard 61, regarding the scope of the school's development needs, both in terms of staffing and the school's understanding of giving potential within its community.

The Visiting Team was intrigued by the Board's executive committee structure, the "queue of three," in which the committee consists of the prior year's chair, the current chair, and the chair-elect for the following year. Although it is an unusual model, it clearly is one that works for Oak Meadow Montessori School and allows for, as described in the Self Study, "smooth and informed transitions to the Chair position" (168). Nevertheless, the Visiting Team suggests that the Board further analyze the "queue of three" model to ensure that it provides the Head of School with an adequate

sense of comfort and effectiveness as he endeavors to make connections with the Board Chair, a process that is perhaps hampered by the frequent change in the Chair's identity.

49. The governing board has a process to regularly plan for the long-range needs of the school.

The Board of Trustees adopted the most recent five-year strategic plan in November 2006. Adopted after the revision of the mission statement in 2005, the plan was carefully thought out, and the process was inclusive, involving members of each branch of the school's constituency. Also, the school has researched and created a notable five-year financial plan, and the Board is well aware of that plan and how it meshes with the strategic plan.

50. The governing board delegates to the head the task of managing the school and supports the administration in its work.

The Visiting Team commends the Board of Trustees for their clarity in understanding their role in delegating the task of managing the school to the Head of School. In the Board of Trustees Policy Manual they include a section about the separation of authority between the Board and the Head of School. There is a clear hierarchy in which the faculty, staff, parents, and students perceive the Head to be the chief executive officer of the school. Parental complaints or concerns are redirected back to the Head, and there are procedures in place via the executive committee should an employee register a complaint regarding the Head.

51. There are effective procedures for channeling the ideas and concerns of the school community into the decision-making process of the governing board.

Effective procedures exist for channeling the ideas and concerns of the school community into the Board's decision making process. The administration and Board host open parent gatherings, and there have been occasional surveys to the parent body that have resulted in significant changes in the after-school program and the hiring of a new employee. Another example demonstrating that ideas and concerns are clearly heard by the Board resulted by numerous complaints raised regarding the frequent small fund-raisers sponsored by the school. As a result, those fundraisers were eliminated to support the parents' participation in the relatively new annual fund.

52. The governing board incorporates diversity and equity in the formulation of school policy as appropriate to its mission and philosophy.

The Board has made notable efforts to encourage incorporation of diversity and equity in the formulation of school policy. The Self Study contained an observation, which was confirmed through conversations with the Visiting Team, that the school views itself to be at a disadvantage in this regard given its suburban location as well as its lack of resources to make a significant impact on financial aid. The school notes that its efforts

are in the planning stage, and hopes to see its financial aid budget eventually grow to help increase the diversity of its student body.

Commendations:

The Visiting Team was particularly impressed with the dedication and involvement of each member of the Board of Trustees; clearly they understand the school, its past, its present issues, and its needs for the future.

The Visiting Team commends the Board of Trustees for their clarity in understanding their role in delegating the task of managing the school to the Head of School.

Recommendations:

None

Suggestions:

The Visiting Team suggests that the Board further analyze the “queue of three” model to ensure that it provides the Head of School with an adequate sense of comfort and effectiveness as he endeavors to make connections with the Board Chair, a process that is perhaps hampered by the frequent change in the Chair’s identity.

EVALUATION

53. *The governing board ensures that specific processes exist for:*

- *Cultivation and recruitment of board members*
- *The education and orientation of new board members*
- *The ongoing education of all board members*
- *Regular board self-evaluation*

The Visiting Team found the Board to be a collegial, lively, and dedicated group. There is a clear policy for researching the identities of and approaching potential new members. Although the Visiting Team found it unusual that so many Board members are current parents, the collegiality of the group as a whole made it clear that the Board, as currently set up, “works for them.” The Visiting Team suggests that the school continue to make efforts to broaden the make-up of the Board to include, potentially, alumni/ae, parents of former students, other educators, and members of the community whose input or wisdom may be beneficial to the Board.

The Committee on Trustees does an outstanding job in educating and providing an orientation for new Board members. New Board members are given an NAIS Trustee Kit and included in Board retreats.

The school has specific processes for the ongoing education of Board members, including attendance at AISNE conferences, periodical subscriptions, and receipt of pertinent

independent school or Montessori-related articles. Also, the Board has invited members of the faculty to present Montessori lessons at Board meetings to educate members about the educational program implemented in the classrooms.

The Board has a system for annual self-evaluation but it is largely based on oral discussion and not written documentation. As noted in other areas, it is an unusual practice, but one which the Board members are comfortable. Perhaps the school might consider at some point introducing a written self-evaluation for the purpose of educating the group as a whole and gauging individual Board members' enthusiasm and interest.

54. The governing board hires and supports the head and regularly evaluates the head's performance through a mutually agreed upon procedure.

The Board of Trustees hired the Head of School through a national search using an experienced executive search firm. The school followed standard procedures and timelines that allowed qualified candidates to apply and acted upon the recommendation of the Search Committee to hire the current Head of School. The Board supports the Head by encouraging his professional development and through a written process of establishing annual goals. The Board reviews the Head's performance annually through his completion of a self-evaluation document and Board members' completion of a written questionnaire. The procedure is comfortable and satisfactory for both the Board and the Head.

55. The governing board enters into a written agreement with the head that stipulates terms of employment and compensation, and ensures the head's right to address the board with regard to situations in which the head's position may be at risk.

The Board of Trustees provides the Head of School with a written agreement that stipulates his terms of employment and compensation. The agreement contains a section ensuring the Head's right to address the Board in a situation in which his position may be at risk.

Commendations:

None.

Recommendations:

None.

Suggestions:

The Visiting Team suggests that the School continue to make efforts to broaden the make-up of the Board to include, potentially, alumni/ae, parents of former students, other educators, and members of the community whose input or wisdom may be beneficial to the Board.

SECTION VIII — ADMINISTRATION

ORGANIZATION OF THE SCHOOL'S ADMINISTRATION

56. Administrative personnel are sufficient in number to carry out their assigned Responsibilities and are organized to carry out the policies of the governing board.

Oak Meadow has an administrative staff that consists of 12 individuals working either full or part time doing an extensive and wide array of jobs. The requirements of their jobs are clearly defined in their job descriptions. All of the members of the administrative team report directly to the Head of School. There are also monthly administrative meetings where all 12 members of the administrative team are required to attend. The Visiting Team noticed that the Head of School has an open door policy and makes the time to meet with any member of the staff in a moments notice if necessary. The Visiting Team recommends that the school form a core administrative team, which meets weekly, to address current and immediate concerns. This team could consist of the highest level of administrative staff and pared down in numbers for greater efficiency.

In reading the Self Study, talking with administrative staff and examining job descriptions, the Visiting Team noted the overly complex and burdensome nature of some of the administrative team member's jobs. The Team was concerned that in some areas the magnitude of the goals might be compromised because of human resources or skill compatibility. For example, having one person in the Development Office whose responsibilities include all development tasks, parent relations, communications and alumni affairs does not allow this person to focus the appropriate amount of time on the complex development efforts. The Visiting Team recommends that the Head of School and administrative team reevaluate the job descriptions to ensure proper and reasonable roles and responsibilities. Part of this process should include examination into what constitutes appropriate training, background, expertise or experience.

At Oak Meadow, each administrative department consists of one person. While having a small staff reduces the bureaucracy and keeps the school appropriately lean, it creates a problem if that staff member is absent for any period of time. For example, the Business Manager is the only person who handles the school accounts and payroll. If she is absent, there is no one trained to perform these essential tasks.

The administrative team reports directly to the Head of School. The Head of School reports directly to the Board at scheduled meetings. Many administrative team members are members of standing committees of the Board of Trustees, but do not attend Board meetings.

Commendations:

None

Recommendations:

The Visiting Team recommends that the school form a core administrative team, which meets weekly, to address current and immediate concerns. (Rec. #7)

The Visiting Team recommends that the Head of School and administrative team reevaluate the job descriptions to ensure proper and reasonable roles and responsibilities. Part of this process should include examination into what constitutes appropriate training, background, expertise or experience. (Rec. #2)

Suggestions:

None

PERSONNEL POLICIES

57. *The school provides the employees with clear written policies and has a process for ensuring that those policies are in accordance with the law.*

All new and current employees receive a copy of the Employee Handbook with current updates. The Employee Handbook is written with guidance from the school's legal council to ensure that any and all issues are covered and worded to protect the school while informing the staff. All employee contracts are written with wording recommended from legal council that is similar to what is in the Employee Handbook. All school employees are also required to sign the employee contract and sign off that they have received, understand, and agree with the handbook. All new employees are required to attend an orientation and are assigned a mentor for the year to provide assistance around culture and operations.

58. *The school has and uses procedures for ensuring that compensation is awarded fairly and equitably.*

Oak Meadow uses a salary scale to determine compensation for its teaching and teaching assistant staff. The salary scale is based on experience, education, and cost of living increases. The Board annually determines the cost of living increases. The salary scale was created to ensure that compensation would be awarded fairly and equitably. The administrative team is not on a salary scale, therefore their salary increases are determined by the Board in conjunction with the Head of School, on an individual basis. The Visiting Team noted that over the last 2 years the administrative team had equal percentage increases in salary with the exception of one employee who had his/her salary increased to get that person in line with what was determined to be average pay for the position. The Head of School has the ability to request funds above the percentage increase for administrators approved by the Board.

59. *The school maintains accurate, adequate, and secure records for all employees.*

Oak Meadow maintains all school records by the National Association of Independent School (NAIS) guidelines around retention and disposal of records. All current records

are kept either in the Head of School's office or the Business Manager's office. The Visiting Team realized that this is done because of lack of space for secure storage, which could be a problem in the future. All of the records are secured in locked file cabinets as well as in locked rooms. The school has recently built a file room for records on non-current students, former staff, and financial records. These proper files are being kept in a fire-protected room. Administrators are the only employees with access to these files. It was expressed to the Visiting Team that there was a lack of space for storage of files at Oak Meadow. The school can currently handle the need, but it looks that there will be a need for storage solutions in the very near future. The Visiting Team suggests the school look at alternatives for electronic data storage to help with this issue in the future.

Commendations:

None

Recommendations:

None

Suggestions:

The Visiting Team suggests the school look at alternatives for electronic data storage to help with limited storage space in the future.

FINANCIAL MANAGEMENT

60. MAJOR STANDARD

The school's policies and procedures for management of its financial resources are adequate and implemented appropriately.

The school's Business Office is made up of one full-time Business Manager and one part-time purchasing agent. The school's Business Manager is responsible for payroll, accounts payable, accounts receivable, billing, and budgeting. The school's purchasing agent is responsible for purchasing and receiving orders. The Head of School is responsible for signing all checks that are processed by the school. The Visiting Team was impressed that a school consisting of a 1.5 FTE Business Office has the required accounting controls in place to keep the duties segregated regarding to processing payroll, accounts payable, and deposits, and signing checks.

Oak Meadow's budget is created with tuition and salary as the two major drivers. The Treasurer, who is a parent, Head of School, Finance Committee, and Business Manager are responsible for creating the school's budget. The budget is prepared in the spring for the upcoming school year and is approved by the Board. The Business Manager provides the Head of School and Treasurer with a year-to-date budget versus actual spending report on a monthly basis for their review. The school contracts out with a separate firm to audit the school's financial statements on an annual basis at year-end to ensure that the school's financials are in line with Generally Accepted Account Principles. In 2007, the

school moved its accounting method from a cash basis to a modified accrual basis. In evaluating the financial statements for Oak Meadow, the Visiting Team was impressed by how accurately the transition was made.

The Visiting Team considers policies and procedures for management of the school's financial resources are adequate and are implemented appropriately for the current objectives of the school. The school has created a 5-year financial forecast that is multi-layered in relation to the projections. There are many different scenarios that look at the budget as it relates to tuition, salaries, utilities, and benefits. The Visiting Team was very impressed with the foresight of the Board and Finance Committee in creating such a document. The Visiting Team also commented on how the 5-year strategic plan demonstrates a clear understanding of where the school is financially and created appropriate goals based on the school's financial position and view of the future.

Examining the school's financial statements, the Visiting Team had a question about what happens to the net income or loss at year-end. In some years it rolls into the school's investment accounts, in other years it stays in the school's operating account. The Visiting Team suggests that the Board of Trustees create a clear policy that addresses what happens to this money. This would allow the school to either build up its investments or roll the money into a plant or contingency fund for future spending needs. The Visiting Team also suggests that the Business Office, in conjunction with the Development Office, needs to look at ways to bring in additional revenue through fundraising, grants, or other auxiliary programs to help offset the cost of salaries, increasing financial aid, and keeping tuition increase low.

Commendations:

The Visiting Team was impressed with Oak Meadow's multi-layered 5-year financial forecast that. There are many different scenarios that look at the budget as it relates to tuition, salaries, utilities, and benefits to protect the school from being surprised by a bad year as it relates to the above categories and what will happen in a good year.

The Visiting Team commends Oak Meadow for creating a 5 year strategic plan with a clear understanding of where they are financially and where they could be in regards to the 5 – year financial forecast.

In 2007 the school moved its accounting method from a cash basis to a modified accrual basis. In evaluating the financial statements for Oak Meadow, the Visiting Team was impressed by how accurately the transition was made.

Recommendations:

None

Suggestions:

The Visiting Team suggests that the Board create a policy for what should be done with the money in years that there is a net operating income. By having a policy this would allow the school to be able to build investment income that is unrestricted.

Visiting Team suggests that the Business Office, in conjunction with the Development Office, needs to look at ways to bring in additional revenue through fund-raising, grants, or other auxiliary programs to help offset the cost of salaries, increasing financial aid, and keeping tuition increase low.

DEVELOPMENT

61. The school has a clear understanding of its long- and short-term development needs and provides adequate resources to meet its development program needs.

In the 2006-07 school year, Oak Meadow hired its first ever Director of Development and Parent Relations to take over the school's 3-year old annual fund. In September of 2007 the school increased this position to a full-time position. The Board has also added to its membership, a trustee with expertise in the development field. Since the inception of the Annual Fund it has increased in monies raised every year. The Visiting Team recognizes that Oak Meadow has made strides in development, but still lacks a clear plan for a development program, and has not provided adequate resources to meet the program needs.

During the Visiting Team's review of the Development Office and culture of philanthropy at Oak Meadow, we saw some areas for improvement that largely focused on education, time, and skill allocation. While there have been efforts made to educate parents about reasons for increased giving, education is still needed. The Visiting Team requests that the school find ways whether through guest speakers, newsletters, professional development, or Board discussions, to educate the Board, staff, and parent population on the basic fundamentals of philanthropy in order to increase fundraising efforts, which in turn creates revenue for the school. The Visiting Team also noticed during interviews and looking at job descriptions that the Director of Development does not have the time that is necessary to focus on cultivating donors, evaluating giving needs of individuals, and researching other forms of giving. There also seemed to be an untapped future resource of alumni/ae that needs cultivation for future giving. The Visiting Team encourages the school to begin cultivating future donors by keeping better records and better communication with alumni/ae.

Most independent schools use annual fund, auctions, golf tournaments, and endowment spending to offset the variance that in tuition revenue and expenditures. This allows any school to increase spending in many different areas such as financial aid, physical plant, stable tuition rates, increasing salaries to attract and retain teachers, and increase technology initiatives.

The Visiting Team recommends that the Development and Advancement Committee and the Director of Development create a 5-year plan that details how they will cultivate each particular portion of the community (parents, alumni, past parents, grandparents, board, friends of Oak Meadow, etc.). Other fund raising efforts such as an auction, capital campaign, and golf tournament can run in conjunction with the yearly Annual Fund.

Commendations:

None

Recommendations:

The Visiting Team recommends that the school consider a two-pronged approach in addressing the development program's weaknesses:

First, the school should find ways, to educate the Board, staff, and parent population on the basic fundamentals of philanthropy in order to increase fundraising efforts.

Second, the Director of Development and Development and Advancement Committee should create a 5-year development plan to guide future goals. (Rec. #1)

Suggestions:

None

PHYSICAL PLANT

62. The school's physical facilities are adequate to support its program.

The school's facility was kept immaculate during the time of our visit, and there were no complaints regarding the cleanliness of the facility during the Team's interviews with staff. This is something Oak Meadow should be proud of, considering the fact that the Facilities Director is part-time and the only school employee responsible for the building. The school does contract out to a cleaning crew of two to clean the building at night.

Oak Meadow is currently maximizing all useful space to support its current programs. However: there is a concern from the staff that additional space is needed for the school to operate more effectively. More space would allow the school to address storage needs and office space. There is also need for a larger meeting area. The school has renovated during the summer of 2007 and has plans to renovate the space even further in the future and has addressed this in the 5-year strategic plan. The Visiting Team noted the school property is sufficient for future expansion if needed.

On a yearly basis the Head of School and Facilities Director do a walk through of the building to address major facilities concerns that need to be addressed in the following year. This helps in creating a forecast for potential facilities needs and allows the school to budget for the needs and include them in the 5 year financial forecast and 5 year strategic plan.

63. The school has a process for ensuring that its physical facilities are in compliance with all federal, state and local legal and regulatory requirements.

On a yearly basis various systems are inspected and tested to insure compliance with all federal, state, and local legal regulatory requirements. The Visiting Team reviewed the school's testing over the last 2 years for fire alarm, fire department compliance, fire suppression, and HVAC systems. The school either passed or was approved after testing was complete. During the tour of the building the Team noticed that there were no fire exit procedures posted in any of the classrooms. The Visiting Team suggests that the school look at having teachers post maps for classroom fire evacuation routes. This would help with the fire drill and evacuation process.

The school reviews their insurance policies and current statement of values on a yearly basis. This review helps to limit financial exposure if the building and contents ever need to be replaced. The school's insurance company also does a yearly building inspection to make sure that the school is in compliance with governmental regulations.

The school does a great job of recognizing facility needs. However, the Visiting Team suggests that the School look into creating a preventative maintenance plan. This will help in reducing replacing equipment before it is fully depreciated. It will also help in the creation of a long-term capital replacement plan. Many schools have also been through a facilities audit from an outside consultant in an attempt to get a better sense of facility needs.

Commendations:

None

Recommendations:

None

Suggestions:

The Visiting Team suggests that the School look into creating a preventative maintenance plan. This will help in reducing replacing equipment before it is fully depreciated.

The Visiting Team suggests that the school look at having teachers post maps for classroom fire evacuation routes. This would help with the fire drill and evacuation process.

FOOD SERVICE

64. Dining facilities, staff, and menu are adequate for the level of services offered.

The school does not have a dining facility. All students are required to bring lunch and eat in either their classrooms or the arts center.

HEALTH AND SAFETY

65. *The School's health care services for students and employees are administered and carried out by personnel whose training and experience are adequate and appropriate.*

The school's health care services are directed and implemented by the licensed school nurse from the school health office. The school's nurse reports to and works in collaboration with the Head of School. The school also has a parent volunteer who is a registered emergency room nurse that they use as a consultant. The Visiting Team suggests the school looks into using a consulting physician on a contract or volunteer basis. This will reduce potential liability and address what will happen when the parent volunteers are no longer at the school.

The health office also provides education programs, individualized health teaching of the students, and in-service programs for the staff. The school nurse has the sole responsibility for dispensing medications. The nurse is also approved by the State of Massachusetts Department of Public Health to train selected staff to administer life-saving medications to students. All medications are stored in the nurse's office in a locked desk drawer. The Visiting Team noticed that Epi-Pens are not stored in a locking cabinet; however when the nurse leaves the room for the day she locks and shuts her door. An extra set of Epi-Pens are kept in the classrooms of children who have severe allergies, but not for all. The Visiting Team suggests the school rethink the "not for all" Epi-Pen policy for classrooms in case of an emergency for minor allergies.

The school requires all children to have yearly physicals and up-to-date vaccination records. These records are kept in a locked file cabinet in the nurse's office. The school also requires each child to have a current physician's order and parental consent before any medication can be dispensed. These same records are kept for employees of the school in the nurse's office. The school is hoping that a new database will help with space issues, as they see that the nurse's office is too small for the number of students seen on a daily basis.

66. *The school has a process to ensure that the health care and safety measures are in compliance with all federal, state, and local regulatory requirements.*

Oak Meadow's health office works in collaboration with the Massachusetts Department of Public Health (DPH) and is in compliance with all regulations that govern school health set forth in the Massachusetts Comprehensive School Health Manual developed by DPH. The school also works with the local police and fire departments to practice routine fire and safety drills. Oak Meadow also has routine safety inspections done by the local public safety departments. The school is looking at developing a more extensive health and procedures manual with a focus on collaborating with families to

develop more individualized student care plans for those identified with high risk problems.

67. The school has an established protocol for dealing with emergencies and/or crises.

Oak Meadow has a very detailed Crisis Management and Emergency Plan. The Visiting Team was very impressed by the comprehensiveness and readability of the plan. The plan has clearly created a step-by-step process articulating how members of the staff should handle all major and minor emergencies. The school also keeps asthma/allergy information in each classroom, the reception area, cafeteria, gym, the Head of School's office, as well as the health office. In reviewing the crisis plan, the Visiting Team noticed that "drawing the shades" is a step in the school's lock down procedures. After touring the facilities the Visiting Team became aware that the majority of windows to the outside did not have shades. The Visiting Team suggests that the school look into creating a plan to get shades in all the windows to align with their lock down procedures.

Commendations:

The Visiting Team was very impressed by the comprehensiveness and readability of their crisis and emergency plan. The plan has clearly created a step-by-step process articulating how members of the staff should handle all major and minor emergencies.

Recommendations:

None

Suggestions:

The Visiting Team suggests the school rethink the "not for all" Epi-Pen policy for classrooms in case of an emergency for minor allergies.

The Visiting Team suggests that the school look into creating a plan to get shades for all the windows in the school that face outside to align with their lock down procedures.

Major Commendations:

1. The Visiting Team commends Oak Meadow Montessori School on a well written, very organized and comprehensive Self Study.
2. Oak Meadow is commended for ensuring that all members were included in the writing and completion of this document.
3. The Visiting Team commends the Oak Meadow Montessori community for putting time and effort into the creation of the school's mission and its actual program. The mission statement clearly reflects the basic strands of the Montessori philosophy and all members of the community live the mission on a daily basis.
4. The Visiting Team was very impressed to see how the culture of Oak Meadow was a reflection of its well-articulated mission and philosophy.
5. The Visiting Team commends the school for its efforts to hire and retain trained Montessori teachers at every level and for every classroom. This supports the actualization of the school's mission to offer child-centered education in keeping with the tenets of the Montessori philosophy.
6. The Visiting Team commends the Head of School for adding key administrative positions in order to strengthen the school's administrative infrastructure and support its financial and communications goals.
7. The Visiting Team commends Oak Meadow Montessori School for its strong commitment to professional training and development for faculty and administration. This priority supports the School's mission of fostering "personal growth" in a community of "lifelong learners."
8. The Visiting Team commends the Head and Assistant Head of School for implementing a consistent process for professional growth, through Professional Growth Plans.
9. The Visiting Team commends the School for its decision making process which is inclusive, collaborative, flexible, responsive, conclusive and productive.
10. The Visiting Team was particularly impressed with the dedication and involvement of each member of the Board of Trustees; clearly they understand the School, its past, its present issues, and its needs for the future.

11. The Visiting Team commends the Board of Trustees for their clarity in understanding their role in delegating the task of managing the School to the Head of School.
12. The Visiting Team was impressed with Oak Meadow's multi-layered 5-year financial forecast that. There are many different scenarios that look at the budget as it relates to tuition, salaries, utilities, and benefits to protect the school from being surprised by a bad year as it relates to the above categories and what will happen in a good year.
13. Oak Meadow has done a wonderful job in creating a 5-year strategic plan with a clear understanding of where they are financially and where they could be in regards to the 5-year financial forecast.

Recommendations:

1. The Visiting Team recommends that the school consider a two-pronged approach in addressing the development program's weaknesses:
First, the school should find ways, to educate the Board, staff, and parent population on the basic fundamentals of philanthropy in order to increase fundraising efforts.
Second, the Director of Development and Development and Advancement Committee should create a 5-year development plan to guide future goals. (Standard #61)
2. The Visiting Team recommends that the Head of School and administrative team reevaluate the job descriptions to ensure proper and reasonable roles and responsibilities. Part of this process should include examination into what constitutes appropriate training, background, expertise or experience. (Standard #56)
3. The Visiting Team recommends that the Head and Assistant Head of School formalize the process of staff evaluation through proposed revision of the Faculty Handbook as well as other types of written communication. (Standard #27)
4. The Visiting Team recommends that the Elementary staff revisit the curriculum horizontally and vertically to ensure that all areas are addressed in depth, with seamless, consistent transition between levels. (Standard #33)
5. The Visiting Team recommends that the School create a schedule and process by which regular curriculum review can be accomplished. (Standard # 31)
6. The Team recommends the School create a comprehensive plan outlining how to communicate effectively and proactively with current and future alumni and past parents. (Standard #21)
7. The Visiting Team recommends that the school form a core administrative team, which meets weekly, to address current and immediate concerns. (Standard #56)
8. The Visiting Team recommends that the Head and Assistant Head of School examine the need to cross-train staff in key positions, particularly positions related to Business Office function. (Standard # 25)