

Oak Meadow Montessori School

Strategic Plan

2006 - 2011

Submitted by:

Board of Trustees 2006

~

“Oak Meadow is now poised to take a major leap forward in its institutional development. We are a highly respected Montessori school with a proven record of success and an enrollment history to support it. Our governing body is both experienced and visionary. Our educational and administrative leadership is strong and knowledgeable. Our teachers are passionate, dedicated and talented. Oak Meadow’s mission is well established and our vision for the future is clear.”

- From Theme IV of Oak Meadow Montessori School Strategic Plan

~

~ Table of Contents ~

Introduction

Our Mission Statement

Theme I: Nurture and Enrich Our Montessori Educational Program

Theme II: Preserve Teacher and Staff Quality and Strengthen the Work Environment

Theme III: Sustain Our Outstanding Facility and Investigate Expansion

Theme: IV: Ensure Strong and Visionary Institutional Leadership

Strategic Planning Participants

~ Introduction ~

Enrichment and Growth

"Planning is an unnatural process; it is much more fun to do something. The nicest thing about not planning is that failure comes as a complete surprise, rather than being preceded by a period of worry and depression." – Sir John Harvey-Jones

"If you are planning for a year, sow rice; if you are planning for a decade, plant trees; if you planning for a lifetime, educate people." – Chinese proverb

Oak Meadow today is a school with a well-established mission, strong values and an excellent program. Our school's strength is reflected in its strong enrollment, the quality of its teachers and staff, and in the success of its graduating students. We have the added benefit of owning an impressive and well-maintained school facility with opportunities for expansion and renovation. In setting key goals for the next five years, we start from a position of strength and opportunity. Our strategic vision is clear: sustain and enrich our existing Montessori program; innovate and grow for the future.

The start of our strategic planning process began by reviewing and updating our existing school mission statement. Through the collaborative efforts of our faculty and staff our mission statement was revised and approved by the Board of Trustees in February 2006.

The strategic initiatives, themes and actions outlined in this plan represent the work of trustees, parents, students, teachers and staff who made up the strategic planning task forces which met during the winter and spring of 2006. Led by a strategic planning consultant, these task forces researched and reported on key aspects of the school's operations: Program; Finances; Facilities, Community; Technology; Teachers and Staff; Governance; and Marketing. During a day-long retreat, the findings were presented and discussed, and yielded major themes which are reflected in this plan.

In order to identifying and assess our major strategic initiatives and set priorities, we used the following key questions to guide our decision making:

- Does this initiative best serve the child and his/her overall development as we have envisioned it?
- Does this initiative serve and support authentic Montessori education and the faculty and staff that deliver it?
- Will this initiative produce a stable, well resourced and sustainable community?
- Does this initiative support the needs of the families we serve today and in the future?

This paper is a guide to our work over the next five years. It will help drive our decisions and focus our priorities for the future. The Board of Trustees will review the plan and evaluate progress against the plan each year.

~ Our Priorities ~

Nurture and Enrich Our Montessori Educational Program

Preserve Teacher and Staff Quality and Strengthen the Work Environment

Sustain Our Outstanding Facility and Investigate Expansion

Ensure Strong and Visionary Institutional Leadership

~ Our 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.

Theme I: Nurture and Enrich Our Montessori Educational Program

What purpose would education serve in our days unless it helped humans to a knowledge of the environment to which they have to adapt themselves?" - Maria Montessori

At the heart of Oak Meadow is our core Montessori program. Some families seek us out because of our Montessori program. Others find us by accident but stay as they discover the richness and value of this educational philosophy, and come to appreciate how it is implemented at Oak Meadow. It is essential that we continue to nurture the Montessori essence of our school.

By observing children closely, Maria Montessori formulated an understanding of how children develop and learn at different stages from infancy through adolescence. Recent brain research has confirmed many of Montessori's observations and insights. For instance, we now know that the growth spurt adolescents experience is almost as dramatic as the first few years of life. As adolescents mature physically, they are also maturing through the rewiring of the synaptic connections in their brains. Today, more than ever, adolescents require a safe environment because of all the insecurities associated with a time of great change. We believe that Oak Meadow's mission must include providing a complete Montessori program from Children's House through 8th grade. We are committed to providing a safe and stimulating learning environment for the social, emotional, intellectual and creative growth of our students.

Action Steps:

1. Implement a continuous process of institutional self-reflection and improvement

To ensure that we maintain the highest standards of Montessori education and remain true to its principles and philosophy we will:

- maintain the highest standards of Montessori education and remain true to its principles and practices.
- conduct the self-study required by the AISNE and AMS accreditation process which will help us identify opportunities to improve our program and to reflect on our educational approach.
- continue to look critically at our own work as educators and be open to new ideas and proven practices that will enable us to more effectively implement Montessori philosophy at Oak Meadow.
- continue to consult with Montessori experts: individuals and organizations.
- continue to fund teacher participation in AMS and other conferences.

2. Support and strengthen our core curriculum based on current educational research

Current brain research and educational trends support and confirm the values and benefits of Montessori education. But the world in which our students live is very different than the world of Maria Montessori's students. The American Montessori Society (AMS) has initiated an ambitious agenda to bring Montessori into the mainstream by promoting flexibility and inclusion. We will ensure that Oak Meadow stays current with social, economic, political, scientific, and technological trends. In order to enrich our program we will:

- add a Health and Life Skills component to the core curriculum along with essential teacher training. The primary purpose of Health and Life Skills is to lead students in age-appropriate discussion and instruction on issues that are important to their physical, social and emotional development. Possible areas of focus might include instruction on good nutrition, building conflict resolution skills and learning about human development. Aspects of the Health and Life Skills components will be incorporated into parent education programs.
- review, discuss and define the declaration of “supports diversity” in the Oak Meadow mission statement.
- incorporate additional Arts components in our educational program.
- review the expressed interest by parents for expanding our Foreign Language curriculum.
- develop standards for computer competency for our students. An assessment plan will be developed that identifies if and where additional technology instruction is needed to prepare our students for the demands of high school. The information researched by the Technology Task Force will be used as a starting point for developing this plan.

3. Further develop the Oak Meadow Montessori Middle School program

As a result of extensive study, reflection and practice, Oak Meadow’s Middle School program currently embodies many of Maria Montessori’s design ideas for creating an early adolescent educational environment. Because Maria Montessori was not able to complete her work regarding the design of the adolescent program, Montessori educators have extrapolated from her writings and proposed various interpretations of how to implement a Montessori middle school program. We will continue to explore Montessori’s writings on adolescence, observe other Montessori adolescent environments, and stay up to date on current adolescent educational practices in order to refine Oak Meadow’s middle school model. This model will remain true to Montessori beliefs and philosophy while adapting to the unique needs of our community.

4. Provide an expanded after-school program for all ages

An expanded after-school program will enrich the overall Oak Meadow experience for students and families. Many parents who work outside of the home need a program that provides structured and stimulating activities for their children until 5.30 p.m. Over the next five years, the after-school program will be expanded, offering activities that meet the interests of children of all ages. This program will be consistent with Oak Meadow values and will be self-funding as families will pay for selected activities.

5. Conduct a feasibility study for an expanded summer camp program

The results of parent surveys conducted over the years indicate that the return of an Oak Meadow summer camp would be welcomed among our families. The greatest demand is expressed by Children’s House and Lower Elementary parents. A summer program has already been provided to Children’s House students since the summer of 2005. The expanded summer camp feasibility study will consider:

- the level of demand from Children’s House and Lower Elementary families.
- the benefits to Oak Meadow families of providing a summer program that is consistent with Oak Meadow values.
- the financial impact to the school, including the cost of hiring a summer camp director.
- the impact on the school’s resources

Theme II: Preserve Teacher and Staff Quality and Strengthen the Work Environment

*"The child is truly a miraculous being, and this should be felt deeply by the educator."
- Maria Montessori*

Our teachers and staff prepare the environment and provide the essential infrastructure in which our students learn and thrive. They guide and encourage each child to explore the world around them and to become purposeful, motivated, and confident in their own abilities. It is important to maintain the quality of our teachers and staff and to continue to improve the environment in which they work.

Action Steps:

1. Support, encourage and recognize professional development

In the Oak Meadow community of learners all of us must model the desire to learn and grow. Maria Montessori said, "We must be taught and we must be willing to accept guidance if we wish to become effective teachers." The school will continue to provide the opportunities and funding for professional development, and to promote an environment where professional growth is valued. To this end:

- teacher salaries will continue to include components that compensate for tertiary education and prior teaching experience.
- whenever possible, we will support faculty and staff interested in assuming leadership roles in the school.
- the school will continue to strengthen the existing program of faculty evaluation and professional growth.
- all lead teachers will be expected to be Montessori certified, or be working towards completing their certification.
- we will continue to reimburse faculty and staff for all approved professional development.
- professional development will not be limited to Montessori training - it will include approved training that strengthens the ability of our faculty and staff to deliver the complete curriculum and to conduct the operations of the school.

2. Assure a competitive and appropriate faculty and staff compensation package

Oak Meadow's faculty and staff are dedicated to serving the Mission of the school. The school's ability to fulfill its Mission is dependent on continuing to attract and retain faculty and staff who are passionate about Montessori education and who contribute to a community that is devoted to the love of learning. Competitive compensation (salary and benefits) helps the school to attract and retain the best teachers and administrative staff. Our compensation benchmarks will continue to compare Oak Meadow with area Montessori and independent schools. Our compensation strategy will continue to be one that balances the goal of offering a competitive compensation package with the task of fiscal management.

3. Evaluate benefit package options in dialogue with faculty and staff

We will follow up on the questions and issues raised in the report from the Faculty and Staff Strategic Planning Task Force regarding employee benefits. Employee benefit plans are a substantial part of the total compensation package. Our employee population is small which necessitates flexibility in a benefits plan. We will continue to evaluate benefit package options that best meet the needs of our faculty and staff.

4. Provide for teacher preparation and planning time outside of the classroom

Our teachers need time during the school day to prepare materials for their classes; to meet with peers; to communicate with parents; to mentor peers and to share ideas. We will fund the hiring of additional teacher assistants or substitute teachers in order to provide our teachers time outside the classroom for these important tasks.

5. Develop and implement a student educational support services plan

We will develop a plan that identifies the educational support services needed by our student community, and how Oak Meadow will support the delivery of those services. Support to students may be provided directly by the school on an as needed basis, or via a referral to outside field experts. The plan will consider the requirements of the school community for services such as: the assessment of learning styles; academic support; tutoring and guidance counselors. The plan will also assess the funding of these services.

Theme III: Sustain Our Outstanding Facility and Investigate Expansion

“The first aim of the prepared environment is, as far as it is possible, to render the growing child independent of the adult.” - Maria Montessori

We are fortunate to own a fine piece of property in an excellent location with an impressive and well-maintained building. Our current facilities enable us to provide an extensive and excellent educational program. However, expanding the facility will enhance our ability to develop our program in ways that we deem important. We will maximize the usage of our current facilities while planning for future expansion that will enable us to realize the ultimate vision for our program.

Action Steps:

1. Develop a Master Plan for facilities expansion, maintenance and improvements

We will update the current Master Plan that describes the needs of our facilities, and its planned configuration over the next five years. The Master Plan will include:

- **Facilities Plan for Maintenance and Improvements**

The Facilities Plan will ensure that budget planning includes monies to maintain and improve the current facilities: classrooms; play areas; library. It will include fiscal planning for long term projects: roof upgrade and replacement; heating and air conditioning units; parking lot requirements; maintenance of grounds and landscaping.

- **Recommendations to Make Our Facilities Increasingly Green**

We will conduct a Green Audit of the school and incorporate findings into the five-year Facilities Plan. Our goal is to identify ways in which Oak Meadow can reduce its environmental “footprint” and actively support its educational philosophy of teaching care and respect for the environment.

2. Produce building plans for a new Multi-Purpose facility

The ultimate vision for Oak Meadow will be achieved with the construction of a new Multi-Purpose building. Preliminary plans already exist for this expansion, which would adjoin the Middle School wing. The additional square footage will provide the school with much needed space to accommodate an art studio, drama workshop and space for theatre productions; music rooms and athletic facilities.

This additional space will enable the school to offer an enriched physical education program for all students. It will provide additional space to accommodate an enhanced arts curriculum. Equally important, the Multi-Purpose room provides a space for all school meetings; for parent meetings and functions; for use by after school and summer camp programs. It will also offer opportunities for rental revenue during after school hours.

The Multi-Purpose building plan will be developed in conjunction with the Capital Campaign plan described in Theme IV.

Theme IV: Ensure Strong and Visionary Institutional Leadership

"A true team both defines objectives and finds ways to meet them." - Sally Helgensen

*"We invite you to dream about the things that can really make a difference in the lives of students and faculty." -
Walter Burgin*

One of the Board of Trustees' primary responsibilities is to make certain that the institution is sustainable – that it will exist for the next generation of students. The Board will continue to implement and support best practices of governance, financial and institutional management, and marketing outreach.

Oak Meadow is now poised to take a major leap forward in its institutional development. We are a highly respected Montessori school with a proven record of success and an enrollment history to support it. Our governing body is both experienced and visionary. Our educational and administrative leadership is strong and knowledgeable. Our teachers are passionate, dedicated and talented. Oak Meadow's mission is well established and our vision for the future is clear.

Our primary challenge for the future is to ensure we capitalize on the many strengths of our School, and to rally our significant resources to both consolidate our assets and reach forward to achieve our goals.

Action Steps:

1. Enhance the effectiveness of the Board of Trustees as a governing body

Oak Meadow has been fortunate to have a very effective Board of Trustees. The school is financially well managed and has been able to purchase, renovate, and enlarge its facilities. As the Board continues to look for ways to strengthen its role as the school's governing body, we recommend the following steps:

- recruit non-parent Board members.
- recruit Board members with critical skills needed for the future.
- recruit Board members such that the Board better reflects the school's population.
- continue annual board evaluations.
- undertake an on-going program of Board education and development.

2. Develop a five-year financial projection of school revenues and expenses

The Finance and Audit Committee of the Board will develop a five-year model of the school's finances in order to assure the feasibility of the growth plans called for in this Strategic Plan. The goal will be to assure the financial sustainability of the institution. This five-year model will take into account enrollment growth, staffing increases, compensation planning and facilities plans.

In order to maximize the impact of our educational mission, we must maximize our fiscal resources. Tuition revenue comprises over 90% of Oak Meadow's total annual budget. Strong enrollment directly impacts the school's financial position, the overall quality of the program, the maintenance, renovation, and expansion of our facilities, and our ability to compensate our teachers and staff competitively. It is particularly important to maximize enrollment in order to maximize tuition revenue. In order to reach our school's capacity of 265 students (full day equivalents), our enrollment goals through Fall 2011 are:

Program	Fall 2006	Fall 2007	Fall 2008	Fall 2009	Fall 2010	Fall 2011
Children's House*	120	120	120	120	120	120
Lower Elementary	73	75	75	75	75	75
Upper Elementary	41	48	51	54	54	54
Middle School	19	20	28	32	33	36
Total Students	253	263	274	281	282	285
Total Full-Day Equivalents	233	243	254	261	262	265

* includes 80 full-day students and 40 half-day students, total of 100 full-day equivalents

3. Strengthen admission's marketing, student retention and the school community

Marketing programs attract new families to Oak Meadow. In-house community programs help us keep our families at Oak Meadow. Today's consumers are savvy and sophisticated when selecting a school. They benefit from all the information they obtain online and may review and decide before they even visit the school. This limits face-to-face interaction and means that our communications to prospective families needs to be of high quality, as well as clear and concise. Our prospective families need better online resources to understand our Montessori philosophy.

Historically, the School's enrollment challenges have been related to retention of students. Like most Montessori schools, Oak Meadow has had a pyramid of enrollment, with many students in Children's House and fewer in each successive age-level program. The Board supports policies and provides resources for our administrative team to be able to work to improve retention from Children's House to Lower Elementary, Lower Elementary to Upper Elementary, and from Upper Elementary to Middle School. Our goal is to achieve enrollment of 120 Children's House students, 75 Lower Elementary students, 54 Upper Elementary students, and 36 Middle School students within five years. Strong enrollment provides tuition revenue while building confidence in the program, meeting the social needs of the students, and ultimately impacting the overall quality of the program. The Board supports the continuation and enhancement of programs to improve admission's marketing, student retention and the school community. These include:

- strengthen admission's marketing efforts with a goal of generating 2.5 applicants per space available.
- upgrade and update the Oak Meadow web site.
- conduct a school-wide communications audit that identifies deficits in our current procedures and opportunities for improvement. The audit should make recommendations identifying how we can be consistent in our communications from each facet of our community. The findings of the Technology and Marketing strategic task forces provide a good starting point for this effort.
- write a Marketing Plan that describes the steps that will be taken to help ensure we meet our enrollment goals. This plan should be updated annually.
- equate Montessori practices with real-world language for better understanding by parents and the broader community.
- continue to support the important work of the OMMS Parent Association in its efforts to strengthen the entire school community.
- appoint a Director of Development and Parent Relations to be a focal point for community activities within the school, and to direct the Annual Fund.
- work to create a sense of Oak Meadow as one community – one school rather than a collection of program levels and classrooms.

- continue to develop an exciting and meaningful parent education program that begins with the admission process and continues with focused events to educate families about the Lower Elementary, Upper Elementary, and Middle School programs.
- implement a program of internal marketing.
- improve support for families of 8th grade graduating students in the selection and application process for high school.
- improve communications to our parents and the broader community about the academic and social strengths of Oak Meadow graduates in high school and beyond.
- use financial aid strategically as an enrollment tool when appropriate.

4. Support institutional advancement through the Annual Fund and Capital Campaign

We must continue to foster a culture of philanthropy at Oak Meadow. The Annual Fund offers an opportunity for Oak Meadow families and friends to express their support for the important mission of the school while providing vital non-tuition revenue. Similarly, a capital campaign will help us to reach our goal of improving and expanding our facilities. Support for fundraising and development can be enhanced in the following ways:

- create the position of Director of Development and Parent Relations and provide professional training for the person in this position.
- continue to publish an Annual Report.
- continue to support the Annual Fund as the one major fundraiser for the school while exploring the possibility of other fundraising activities.
- explore a capital campaign by hiring a consultant to perform a feasibility study.

5. Obtain dual school (AMS and AISNE) accreditation

Dual school accreditation is planned (American Montessori Society and Association of Independent Schools of New England), with a self-study beginning in school year 2006-07. The process of accreditation will strengthen our overall program and will help identify areas where additional improvement is needed – both as a Montessori school and as an Independent school. Successful completion of the accreditation process will enhance our reputation for excellence in education.

6. Improve the effectiveness of Oak Meadow's technology infrastructure

Using the findings and the recommendations of the Strategic Planning Technology Task Force as a starting point, we will establish an IT Committee to define Oak Meadow's requirements for school management software and library software; to evaluate available solutions; to assess the cost to implement and to recommend the best solution.

~ Strategic Planning Participants ~

Judi Adamyk
Katharine Adamyk
Lisa Bergen
Sally Blute
Fiona Carr
Suzie Coughlan
Nijan Datar
Mike Dempsey
Joanna DeStefanis
Peggy DiSarcina
Mary Dupont
Richelle Dupont
Tolga Erdogan
Sean Flavin
Lyn Goldman
Jeanne Gorham
Elizabeth Hickey
Craig L. Holbrook
Tom Hotchkiss
Anna Howard
Arthur Karp
Catherine Karp
Karen Kelly

Tanni Kuo
Deb Larsen
Chris Lynch
Kelly Marchand
Mary McAvoy
Kellie McElhinney
Abigail Miller
Jeffrey Nelson
Gaugarin Oliver
Cindy Puleo
Audrey Sampson
John Saywell
Tim Sloane
Joann Stemmermann
Dave Stettler
Paul Strobel
Julie Trani
Mark VanDorpe
Sheila Webber
Taylor Winston-McGrath
Elisabeth Wise
Jonathan Wolff
Billy Wood