

# STRATEGIC PLAN

June 2021

OAK  
KNOLL



MONTESSORI  
SCHOOL



Dear Oak Knoll Community,

The Strategic Plan that you see here is the result of much effort on the part of the many individuals that make up our community.

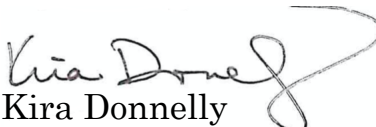
In the fall of 2020, Oak Knoll began to plan for a new Strategic Plan. As part of the process, the Board of Trustees ensured that everyone who wanted to could participate in crafting the plan. Through Focus Groups, a community survey, and individual conversations with constituents, OKMS Faculty, parents, and trustees all participated in conversations which were then synthesized and tabulated to provide us with our areas of growth and a path forward.

No organization is static. Even schools that have been around for decades think about the ways that they can improve. This Strategic Plan represents the best hopes and wishes of the Oak Knoll community and our opportunities for growth.

I am happy to share this plan with you and ask for your help. The items articulated in this plan won't happen without our entire community engaging in the work. Expect regular updates as we move forward and look for opportunities to participate that make sense to you.

I am so grateful for your support in this work already and look forward to our ongoing dialogue.

Enjoy!

  
Kira Donnelly

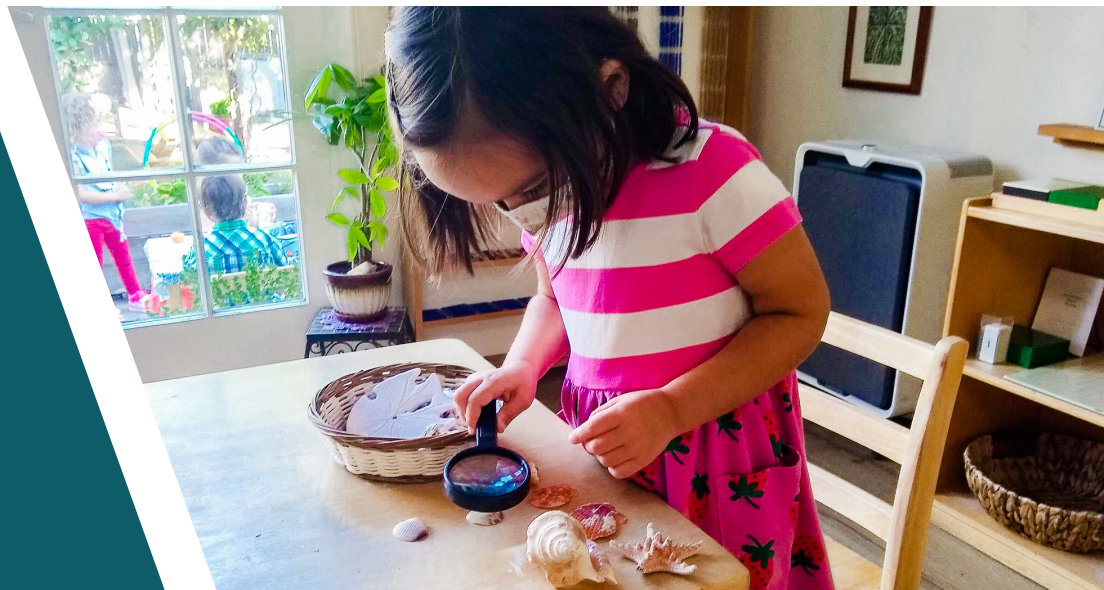


## THE PROCESS

- Board set out a calendar in November of 2020 with the intention of getting insight and input from the community
- Initiated the Strategic Planning process in January 2021 at the State of the School Address
- Created a survey that was available and open for approximately a month in the January – February time period
- Focus groups happened during January and February

## THE INPUT

- Survey had 57 unique respondents. (Approx. 75 families at OKMS at the time)
- Focus Groups garnered 27 unique parent respondents and 17 faculty and staff
- Additional interviews were held in March to gain deeper, specific insight from an additional four families.
- Board met and discussed results over March, April, May meetings as well as our board retreat





**Over the next five years, OKMS will focus on four major strategic areas to realize our vision of a stable, strong, thriving and growing school**

**COMMUNICATION**

***Equity & Justice***

Pursue an anti-racist application of Montessori pedagogy and build a community of belonging.

***Community Growth***

Expand enrollment, programs, and Montessori thought leadership in the greater Los Angeles area.

***Academic excellence***

Optimize knowledge building across the full program, from toddler to adolescent. Deepen understanding of the Montessori method among the school community

***Operational excellence***

Refine organizational infrastructure to position OKMS for stability and sustainable growth.



## ***Equity & Justice***

**Pursue an anti-racist application of Montessori pedagogy and build a community of belonging.**

### **Initiatives**

### **Major Activities**

***Continue community education***

- Engage an external expert to help the Board and HOS grow expertise, comfort level and confidence to lead in this area

***Cultivate a culture of belonging***

- Establish inclusive shared language and norms
- Revisit community events through equity lens (e.g. mom vs. dad events, international festival)

***Re-evaluate HR through equity lens***

- Analyze and adjust staff recruiting, professional development / training, benefits for both salaried and hourly employees to make the OKMS community more representative of the broader Los Angeles community



## **Equity & Justice**

**Pursue an anti-racist application of Montessori pedagogy and build a community of belonging.**

### **Initiatives**

### **Major Activities**

**Re-evaluate admissions through equity lens**

- Analyze and adjust marketing, admissions and financial aid processes to make the OKMS community more representative of the broader Los Angeles community
- Explore participation in childcare subsidy programs
- See also Alternative Tuition Models initiative

**Conduct comprehensive policy review**

- Learn the appropriate language
- Conduct comprehensive review of all Board and school policies, dissecting for appropriate language (e.g., Parent Handbook, Employee Handbook, Board policies)

**Conduct comprehensive curriculum review**

- Conduct comprehensive review of curriculum with an equity lens (e.g., history, read aloud books)
- Collaborate with Montessori for Social Justice and AMI as needed



## **Community Growth**

**Expand enrollment, programs, and Montessori thought leadership in the greater Los Angeles area.**

### **Initiatives**

### **Major Activities**

#### **Increase enrollment**

- Add new Toddler and Primary classrooms to capture waitlist demand
- Cultivate relationships with Heads of local Montessori schools and other well respected early childhood programs to increase recruitment pipeline
- Cultivate relationships with other schools to increase recruitment for Adolescent program specifically
- Explore relaunching Infant Montessori program community wide to raise awareness among prospective Toddler families
- See also initiatives under Academic Excellence and Equity and Justice strategic focus areas

#### **Develop Alumni engagement strategy**

- Build out more robust alumni CRM tool
- Establish recurring touchpoints for alumni to stay engaged



## **Community Growth**

**Expand enrollment, programs, and Montessori thought leadership in the greater Los Angeles area.**

### **Initiatives**

### **Major Activities**

*Plan for  
permanent  
unified campus*

- Build a network of strategic relationships within the community to prepare for a capital campaign
- Develop a long-range facilities plan
- Pursue real estate opportunities in Pasadena and Altadena

*Montessori  
Consortium*

- Form Consortium of Montessori practitioners in the greater Los Angeles area
- Create opportunities for OKMS to mentor and provide thought leadership to other Montessori or non-Montessori programs and schools

*Cultivate  
partnerships*

- Explore activity and collaboration out in the community with other schools or organizations e.g., community service projects, participation in multi-school initiatives, etc.
- Network and collaborate with other local schools for adolescent athletics





## *Academic Excellence*

**Optimize knowledge building across the full program, from toddler to adolescent. Deepen understanding of the Montessori method among the school community.**

### **Initiatives**

### **Major Activities**

#### *Parent Communication*

- Increase frequency and transparency of communications related to academic progress: more formal parent conferences, reporting, understanding the milestones
- Enhance parent education through experiential events

#### *Student Support*

- Add an early childhood coordinator role
- Ensure consistency within programs across classrooms
- Ease transitions across planes of development and for children entering OKMS from other schools
- Create and share inclusive educational process for struggling students

#### *Diversity of student experiences*

- Expand diversity of academic and social emotional experiences (e.g., languages, exposure to different cultures)



## **Academic Excellence**

**Optimize knowledge building across the full program, from toddler to adolescent. Deepen understanding of the Montessori method among the school community.**

### **Initiatives**

### **Major Activities**

#### **Restart Going Out Program**

- Build processes and systems to support Going Out program
- Develop a scaffolding of Going Out experiences for Elementary children to prepare for independent Going Outs at the Adolescent level

#### **Raise the academic bar**

- Define academic milestones for leadership years (CCSS, AMI, etc.)
- Measure progress towards academic milestones
- Increase accountability against academic milestones

#### **Mentor and support guides**

- Establish a mentorship program for Guides
- Increase cohesion across programs and continuity of delivery, language, actions



## **Operational Excellence**

**Refine organizational infrastructure to position OKMS for stability and sustainable growth.**

### **Initiatives**

### **Major Activities**

#### **Financial**

- Explore alternative tuition models
- Form Development Committee and develop fundraising plan
- Refine long term financial planning forecasting tool and formalize process (e.g. importing inputs, refining data sets pulled out, automation)
- Develop strategy for steadily increasing savings (also ties into long range facilities plan)
- Understand new accounting requirements as the school grows

#### **Communications**

- Enhance internal HOS communications – to parent community and staff (e.g., school updates, staff updates)
- Increase frequency and transparency of Board communications to community
- Develop systematic, strategic parent education program, engage parents in conversation and partnership



## **Operational Excellence**

**Refine organizational infrastructure to position OKMS for stability and sustainable growth.**

### **Initiatives**

### **Major Activities**

#### **Systems, policies and procedures**

- Continue to revise / enhance policies and procedures – policy governance gaps, bullying etc.
- Reconcile and streamline technology systems to achieve greater efficiency for staff and families

#### **Organizational structure**

- Document clear job descriptions, expectations, assessments
- Optimize human resources e.g. average staff tenure, satisfaction, recruitment of new roles / positions
- Strategically grow Board size and skill sets required to support school growth

**Special thanks to Wendy Driscoll, the OKMS Board of Trustees, and the OKMS community for your dedicated work in creating this Strategic Plan.**

**Now the hard work really begins!**