

**St. Joseph Montessori School**  
**Strategic Plan**  
**2021-2026**



**Goal: Educational & Program Excellence:** Guided by the Montessori Method Ensure and enhance continued educational excellence in support of our students, teachers, and families.

**Objective:** Mission and Vision are students centered and guided by Montessori pedagogy.

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Full faculty/HOS	Faculty will review Mission and Vision statement annually	Faculty meeting minutes	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
Full Faculty/HOS/BOT	Examine Mission and fidelity to the Catholicity portion of the Mission	Faculty Meeting Minutes/BOT meeting minutes	N/A	2021-22 through 2023	

**Objective:** Establish and communicate a shared philosophy that informs all facets of the school's culture

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Full Faculty/HOS	SJMS will develop Identity Statements aligned to Core Values that provide for internal and external culture	Completed Identify Statements	N/A	2021-22	
HOS	Identity Statements will be embedded into Faculty Evaluation	Updated Faculty Evaluation	N/A	2022-23	

Full Faculty/HOS	Identity Statements are reviewed annually by all faculty	Faculty Meeting agenda	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
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**Objective:** Establish and communicate a shared philosophy that informs all facets of the school's daily operations

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Administrative Team	Standard Operating Procedures will be written for each critical process of the administrative team	SOP's for each administrative department	N/A	2022-23 through 2022-24	
Board of Trustees and Administrative Team	A continuity plan will be developed that identifies steps required to mitigate risks and recover from a loss	Continuity Plan	N/A	2023-24 through 2024-25	
Board of Trustees and Administrative Team	Develop plan to ensure the appropriate storage of critical documents	Document Storage	Possible upgrade to Server and electronic storage capacity	2023-24 through 2024-25	

**Objective:** Establish and communicate a shared philosophy that informs all facets of instructional decisions

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Transparent Classroom team/HOS/Accreditation Manager	Ongoing Professional Development with Transparent Classroom <ul style="list-style-type: none"> <li>● Planning</li> <li>● Photos</li> <li>● Tagging</li> <li>● Note taking</li> </ul>	Calendar Agenda for PD	Title II funding	2021-22	
HOS	Establish consistent expectations through Transparent Classroom for the following: <ul style="list-style-type: none"> <li>● Photos</li> <li>● Parent ed</li> <li>● Record keeping frequency</li> <li>● Lesson planning</li> <li>● Observation notes</li> </ul>	Transparent Classroom Expectation document	N/A	2021-22	
HOS/Accreditation Manager	Evaluate the amount of planning time each professional has to record plans, lessons, and communicate via photos with	Document with professional planning time documented for each position	N/A	2021-22	

	Transparent Classroom				
HOS	As need was indicated through faculty performance evaluations; Provide observation professional development	Calendar PD agendas  Resources purchased and/or guest speaker/presenter	Title II funding	2021-22 through 2022-23	
Full Faculty/HOS	Ohio State Learning Standards; Clear understanding Academic Vocabulary; Develop SJMS Standards based Academic Vocabulary Glossary to be used by all levels	SJMS Academic Vocabulary Glossary	N/A	2022-23 through 2025	

**Objective:** Promote student learning and school effectiveness through strong governance aligned with the school's Mission and Vision

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Board of Trustees	The BOT will engage with a Board Development Specialist to help	Reviewed and renewed by-laws  Committee charters	Consultant hourly fee: \$100 an hour Approximately 60 hours	2021-2022 through 2023	

	<p>guide work in the following:</p> <ul style="list-style-type: none"> <li>• development of committee charters</li> <li>• effectiveness of meetings</li> <li>• By-law reviews</li> <li>• HOS and BOT roles and responsibilities</li> </ul>	Meeting agendas			
Board of Trustees	The BOT will review and update by-laws on a yearly basis	Updated BOT By-laws	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
Board of Trustees	The BOT will update and improve onboarding of new trustees to match Independent School Management and Board Source best practices	Onboarding Guidelines in the BOT By-laws	N/A	2022-23	
Board of Trustees/HOS	The BOT will empower the BOT Chair to facilitate more productive	Meeting minutes Action Items Report templates BOT Annual survey	N/A	2021-22	

	meetings by establishing consistent structure, consistent expectations, action step outcomes, and established timelines for action.				
HOS/BOT/SJMS School Community	Complete AMS Self-Study, Self-Study Report, host on-site accreditation visit fall of 2022 Self-Study due date is May 1, 2022	Complete Self-Study Meeting Minutes Faculty Meeting Agendas Full Accreditation	Budget \$10,000-\$15,000 for on-site visit	2021-Fall 2023	

**Objective:** Establish, implement, monitor, and refine a strategic planning process to ensure continuous improvement

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Assigned team member/HOS	Strategic Planning reviews will happen quarterly at Faculty Meetings	Faculty Meeting Agenda	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
Full Faculty/HOS/BOT/SJMS Community	Continue and complete AMS Self-Study process that is closely connected to SJMS Strategic Plan	Meeting notes from 2020-21 Self-Study steering committee meetings Faculty Agendas Professional Development Days	N/A	2020-21 through 2023	

HOS	Develop Annual Agenda to be presented to the BOT and larger SJMS community based on yearly strategic action items	Kick-off document to be shared with entire SJMS community	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
President BOT	Develop Annual BOT Agenda to be presented to the HOS and BOT based on yearly strategic action items	Presented at July/August BOT Retreat	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	

**Objective:** Implement Montessori curriculum based on clear and measurable learner outcomes and benchmarks

Who?	Action Steps	KPI	Budget	Timeline	Complete?
HOS/Full teaching faculty	Complete SJMS Benchmark Documents based on Montessori scope and sequence	Complete Benchmark Documents	N/A	2021-22	
HOS/Full teaching Faculty	Complete Ohio State Standards Review (Office of Early Learning standards where applicable)	Faculty Meeting Minutes/Notes	N/A	2021-22	



HOS/Full teaching Faculty	Complete SJMS Academic Vocabulary Glossary to ensure consistent use of academic vocabulary across all levels	Faculty Meeting Minutes/Notes Completed Academic Vocabulary Glossary	N/A	2022-2023 through 2025	
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**Objective:** Students' actively engage in the learning process evidenced through joy of learning

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Full Faculty/HOS/Family Association	Host events that are community building and not fundraisers; Community clean in the fall Service Learning Opportunities that are hosted by the school	Calendar of events	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
Full Faculty/HOS	Continue developing and expanding presentations of learning to allow students creative expression of mastered learning	Student projects Evaluation Rubrics	N/A	2022-23	
Full Faculty/HOS	Continue	Club Schedule	Club fees to cover	2021-22 through	

	developing and implementing afterschool clubs as enrichment to Montessori programming		\$25 per session teacher stipend. Club fee should cover expenditures	2026	
Full Faculty/HOS/Summer Learning Camp Coordinator	Continue offering 8 weeks of summer learning camp that offer connections to outside experts and organizations as presenters/partners	Summer Learning Camp Brochure	Employee salaries: \$1,000 lead teacher \$650 SJMS Employee Assistant \$500 non-SJMS Employee Assistant \$420 11-6 \$240 2:30-6	Summer 2022 through 2026	

**Objective:** Students' actively engage in the learning process evidenced through application of knowledge to real-world situations

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Catechist/Director of Development/Family Association/Parents	Add Service projects at each level that support the corporal works of mercy and have impact on the greater community	Friday Notes Established connections with community organizations	N/A	2022-23 through 2023-26	
UE Team/MS Team/Catechist/Parents	Require service hours of UE and MS students to incorporate the Corporal Works of	Document to track service hours Established connections with community	N/A	2022-23 through 26	

	Mercy and connect with their faith.	organizations			
STEAM Coordinator/HOS/UE Team/MS Team/Art Specialist/Library Specialist	Establish and implement a "Problem Bank", push in programming at lower levels as exposure to STEAM/Engineering concepts	Established connections with community organizations  STEAM Coordinator or community liaison	STEAM budget (\$8,000 Sprint for STEAM)  Building budget to transform upstairs offices into STEAM Lab	2022-23 through 2026	
Catechist/Director of Development/Administrative Assistant/Family Association/Parents	Promote community outreach and volunteerism through community connections such as:Huckleberry House, Kiwanis (Kids Club), and Dream Center	Kiwanis Member Kids Club established Established connections	N/A	2022-23 through 2026	
Director of Development/Catechist/Faculty	Become better neighbors by showing appreciation to those residents who border SJMS: <ul style="list-style-type: none"> <li>- Beautify the neighborhood</li> <li>- Adopt Hamlet Street</li> <li>- Make Holiday</li> </ul>	Holiday cards made and delivered  Schedule of classroom cleanups	Cost of garbage bags  Gloves  Trash tongs	2022-23 through 2026	

	<p>Cards for our neighbors.</p> <ul style="list-style-type: none"> <li>- Deliver "Thank You for being our neighbor" cards.</li> </ul>				
HOS/Technology Coordinator/STEAM Coordinator	Implement a Computer Science Curriculum at appropriate levels	Adopted Computer Science Curriculum	?	2023-24	

**Objective:** Enact an ongoing assessment system that monitors and documents learning outcomes

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Full Faculty/HOS	Continue professional development with Renaissance Education on STAR report data and classroom practice	Completed Professional Development CEU's	\$550 annually	2021-22 2022-23 2023-24 2024-25 2025-26	
Student Services Manager, HOS, OSWI Pilot School Team	Investigate the need and appropriate SEL assessment to add to the existing assessment suite (SELWeb, Strengths and	Purchased assessment tool	\$5,000 OSWI Pilot School Award	2021-22 2022-23	

	Difficulties Questionnaire)				
Full Faculty/HOS	A Student Driven Leadership initiative will be developed with an emphasis on providing ways to develop Portrait of a Graduate skills; students at all levels will be given the opportunity to explore leadership in various ways such as mass buddies, reading mentors, Interest Fair partners	Faculty Meeting Notes Level Meeting Notes Cross Level Meeting Notes	N/A	2022-23	
Full Faculty/HOS	Create a document that gives a clearly defined definition of "Learner Outcomes". The definitions for each our of SJMS Portrait of a Graduate Characteristics: Independence, Global Citizenship, Curiosity, Life-Long Learning, and Confidence will be	Faculty Meeting Notes Level Meeting Notes Cross Level Meeting Notes Portrait of a Graduate documents	N/A	2022-23	

	revisited and redefined				
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**Objective:** Enact an ongoing assessment system that uses the results to improve educational effectiveness

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Full Faculty/HOS	Choose three to five STAR Reports annually to disaggregate student data. Familiarize faculty with reports, data gleaned, and improvement classroom instruction strategies	Faculty Meeting/Professional Development Data	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
Full Faculty/HOS	Establish form for recording Portrait of a Graduate goal setting from BOY PofG Rubric assessment.	P of G goal setting form	N/A	2022-23	

**Goal: Financial and Environmental Excellence:** Leverage out solid financial health to strengthen our facilities, our Montessori environments, support our faculty and staff, and plan for future growth.

**Objective:** Establish and follow policies and practices that ensure employees are well qualified and are assigned professional duties based on their qualifications

Who?	Action Steps	KPI	Budget	Timeline	Complete?
HOS/Director of Admission/Director of Business Operations/Accreditation Manager/Director of Development	Create a detailed onboarding plan that includes: <ul style="list-style-type: none"> <li>● A tour of the entire facility</li> <li>● Montessori 101</li> <li>● How to use the phones</li> <li>● Classroom Observations</li> <li>● Employee work expectations</li> <li>● New Employee folder</li> <li>● Who to contact sheet</li> <li>● Who is the primary point of contact for the onboarding process?</li> </ul>	Onboarding planning document  New Employee folders	N/A  (unless onboarding Montessori 101 and discussions are held on Saturday then \$2,000--depending on number of new hires)	2022-23 through 2024	

**Objective:** Employees are provided support through ongoing evaluation and professional development

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Full Faculty/HOS	As indicated through 2020-21 teacher evaluations; participate in classroom Observation Professional Development	Schedule Completed PD Improvement in observation focus, length, and consistency Use of observations to affect instructional practice	N/A	2021-22	
Full Faculty/HOS	As indicated on SJMS OCSAA academic goals teachers will engage in Quantitative Reasoning professional development	Scheduled PD Resource articles	N/A ? Professional development in QR, Quantitative Fluency, and Critical Thinking	2021-22 through 2025	
HOS/Accreditation Manager	In June of each year develop Professional Development Plan	Produced PD Plan	N/A The plan has no expenditure, but implementation may require funding; Title II	2021-22 through 2026	



**Objective:** Employees are sufficient in number to support the school's Mission and Vision

Who?	Action Steps	KPI	Budget	Timeline	Complete?
HOS	Procure a STEAM third party provider or SJMS employee to oversee STEAM initiative	Hire or contract with STEAM provider	Salary; \$32-40K Third Party Provider; \$20-30K	2021-22 Full implementation 2022-23	

**Objective:** States and follows fairs, ethical, and non-discriminatory practices

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Cary Dabney/ Cultural and Cultural Humility Committee/HOS/SJ MS Stakeholders	Employ Cary Dabney, Office of African American Studies Walsh University, to lead Cultural Humility training for faculty and community members	School Calendar Meeting Minutes Completion Certificates Inclusive practices evident in classroom environments  Trained Cultural Humility Committee	Sessions are \$100 each + travel + lodging  Books: Heart... <b><u>A Journey Through Cultural Humility for Diversity and Inclusion Formation</u></b> by James Knight.	2021-22 through 2023-24	
Business Manager/BOT/HOS /Director of Development	Offer more in tuition assistance so that SJMS becomes affordable to more families. - Secure more corporate sponsors to offset expenditure	Announcement of "Sponsor a Student" program Update View Book to be used as a corporate outreach tool Presence in the community-local events calendar BOT	N/A	2021-22 through 2026	

	<p>s and free up more of the budget for tuition assistance.</p> <ul style="list-style-type: none"> <li>- Rollout a program where individuals and corporations can “sponsor a student” anonymously.</li> <li>- Continue to explore Ed Choice.</li> </ul>	minutes--EdChoice conversations and decision			
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**Objective:** Provide facilities, equipment, and materials that meet and exceed optimum health and safety standards conducive to a safe learning environment and are in alignment with the Mission and Vision of the school.

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Director of Marketing, Development, and Project Management/HOS/ Facilities Manager	Oversee a building audit	Completed building audit	\$.08 to \$.24 a square foot	2021-22	
Director of Marketing, Development, and	Complete a building maintenance plan that includes	Completed building maintenance plan	N/A Cost to building	2021-22 through 2022-23	

Project Management/HOS/ Facilities Manager/BOT	painting		maintenance  Contingency fund in budget		
Director of Marketing, Development, and Project Management/HOS/ Full Faculty	Complete furniture replacement document and rotation for refreshing classroom environments	Completed furniture replacement plan	N/A  Cost to replacement furniture  General budget line item	2022-2023	
Director of Marketing, Development, and Project Management/HOS/ Facilities Manager	Complete Safety upgrade plan and timeline for physical facilities	Completed safety upgrade plan	N/A  Cost for safety upgrades	2022-23 through 2023-25	
HOS/BOT President/BOT Facilities Committee	Investigate the options for relocation of the school or expansion of the Toddler/Children's House programming to a second site  Formulate an expansion plan	Formation of BOT Facilities Committee Negotiations with Diocese of Columbus Solidification of real estate broker	N/A for plan	2021-22	
HOS/BOT Facilities Committee	Examine connection and financial benefits from the Dicoese of	Committee minutes Collected Data	N/A	2021-22	

	Columbus to SJMS				
HOS/BOT Facilities Committee	IF relocation and/or expansion is agreed upon; relocation/expansion plan developed	Relocation/Expansion Plan	N/A	2021-22	

**Objective:** Maintain strong and prudent financial management practices that support Mission, Vision, and programming

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Business Manager/HOS/Director of Project Management	Create a furniture replacement schedule to update each environment and provide alternate seating for students as needed.	Rotation list published in Faculty Handbook  Furniture orders	\$4,000 per year for furniture replacement	2021-22 2022-23 2023-24 2024-25 2025-26	
Business Manager/HOS/Director of Project Management	In order to facilitate going out and connections within the community, explore the costs of purchasing a mini bus <ul style="list-style-type: none"> <li>• Cost/Benefit Analysis of a mini-bus</li> <li>• Look into alternative ways to transport</li> </ul>	Cost analysis of owning vs. renting including cost of the mini-bus, insurance, CDL licenses	\$60,000	2022-23 through 2025	

	students (Ohio Arts Council)				
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**Objective:** Maintain strong and prudent financial resources to support the Mission and Vision

Who?	Action Steps	KPI	Budget	Timeline	Complete?
BOT	BOT investigate outside corporate or friends of not-for profits for outside funding sources	Secured financial gifts	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
HOS/BOT President	Use AMS tuition survey to analyze appropriate tuition increases and viability	AMS Tuition Survey	N/A AMS membership	2021-22	

**Objective:** Ensures that appropriate documentation, training, and human resources meet applicable federal, state, and local regulations, assure health and safety of faculty and students.

Who?	Action Steps	KPI	Budget	Timeline	Complete?
HOS/Accreditation Manager	Develop a more streamlined onboarding process for new employees; include trainings, necessary	New Employee folders	\$6.00 per folder	2021-22	

	documents, etc..				
HOS	Provide Montessori 101 training for new employees and non-credentialed employees	Calendar/schedule	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
HOS	Provide Positive Discipline training for new employees	Calendar/schedule	N/A	2021-22 2022-23 2023-24 2024-25 2025-26	
HOS/Office Manager	Investigate the possibility of a full time School Nurse	Data of visits to school clinic during 2021-22 (non-COVID year) NPSS Budget	\$55,000 annually NPSS Funding	2021-22 through 2023	
HOS/Accreditation Manager	Develop a safety training cycle and provide required safety trainings based on cycle (Childcare Training Ohio)	Calendar Schedule Contract with Safety Training vendor	Per Person: <ul style="list-style-type: none"> <li>• \$50 CPR/First Aid--every other year all faculty</li> <li>• \$30 (3 hour) Communicable Disease--every 3 year all T,CH, extended care</li> <li>• \$40 (6 hour) Communicable Disease</li> <li>• \$30 (3 hour)</li> </ul>	2021-22 2022-23 2023-24 2024-25 2025-26	

			<p>Child Abuse Prevention-- every 3 years T,CH, extended care</p> <ul style="list-style-type: none"> <li>• \$40 (6 hour) Child Abuse Prevention</li> <li>• \$72 FBI/BCI background and fingerprint-- every 5 years all faculty</li> </ul>		
HOS, Student Services Manager, OSWI Pilot School Team, Full Faculty, Parents	Implement SEL best practices, curriculum, and needs based on SEL assessment data (which includes teacher observation and parental input). Use OSWI resources to determine best practices and available resources (include Abre)	Purchased assessments (WebSEL) SST meetings Student Action Plans Delivered Curriculum (Friendzy)	\$5,000 OSWI pilot school grant	2021-22 2022-23	

**Goal: Strong Community and Profile:** Nurture our community and build knowledge and awareness of the strengths and benefits of Montessori education and collaborate and develop partnerships within the community, both internally and externally

**Objective:** Enable all students to achieve expectations for student learning outcomes

Who?	Action Steps	KPI	Budget	Timeline	Complete?
HOS/Accreditation Manager/Full Faculty	Provide Professional Development for teachers to use STAR to guide instruction	Use of STAR Planning Report to guide Montessori lesson planning and lessons as evidenced through Transparent Classroom	Renaissance Education \$450	2021-22 2022-23 2023-24 2024-25 2025-26	

**Objective:** Fosters effective communications and relationships with and among all stakeholders

Who?	Action Steps	KPI	Budget	Timeline	Complete?
Family Association/Director of Development/Director of Admission/Communications Manager	Getting families together outside of school to foster lasting relationships, this could aid in retention. - Enlist the parent	Calendar Communications Established Parent Ambassador program Family Association schedule and communications	N/A	2021-22	



	<p>ambassadors to be a welcome committee for new families.</p> <ul style="list-style-type: none"> <li>- Create a program for new families where they are paired with an existing "host" family for their first year.</li> <li>- Make "Welcome to School" phone calls to new families</li> <li>- Host regional activities/meet ups for families outside of school. I.e. meet at Ballantrae Park for sledding or Lynd's Fruit Farm in the fall.</li> </ul>				
Director of	To be a more	Schedule	Costs associated	2023-24 through	

<p>Development/Director of Admission/HOS/Faculty/Communications Manager</p>	<p>visible presence in Italian Village, how do we become a known gem?</p> <ul style="list-style-type: none"> <li>- Have booths at festivals</li> <li>- Glass classroom at Italian Village Festival and State Fair</li> <li>- Summer Movie Series - Movies on the Lawn for current families and those in the neighborhood. (June - October, bring in Food Trucks)</li> </ul>	<p>Communications</p>	<p>with venues/movies/food trucks, etc.</p>	<p>2026</p>	
<p>Alumni/Director of Development/Accreditation Manager/HOS/MS Faculty/Director of Admission</p>	<p>Improve Alumni Engagement:</p> <ul style="list-style-type: none"> <li>- Create a mentorship program with young alumni to mentor the current</li> </ul>	<p>Development and implementation of "Buddy Program" Calendar Brunch scheduled</p>	<p>Cost associated with Brunch</p>	<p>2021-22 through 2026</p>	

	<p>Middle School students.</p> <ul style="list-style-type: none"> <li>- Have alumni be a guest speaker in the MS classroom on a quarterly basis.</li> <li>- Alumni Brunch</li> </ul>				
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**Objective:** Fosters effective communications and relationships with and among the greater Montessori community supporting the vision that Montessori is beneficial for all children

Who?	Action Steps	KPI	Budget	Timeline	Complete?
HOS/Director of Development/Director of Admission	Foster strong relationships with other quality Montessori schools in the area.	Calendar Meeting Minutes	N/A	2021-22 through 2026	
Director of Development/Communications Manager/Administrative Assistant	Work with other Montessori schools to film/create a PBS Kids Special on the Benefits of Montessori	PBS Special is created	?	2023-24	
HOS/Director of	Explore the	Calendar	N/A	2022-23	

Development/Director or of Admission/Administrative Assistant	possibility of creating "Montessori Meet Up" Parent Groups	Agendas			
HOS/Director of Development/Director or of Admission/Toddler Faculty	Revisit adding "Parent and Baby" Monthly Classes on campus.	Calendar Agendas Curriculum for weekly meetings	N/A May be a funding source	2022-23	
HOS/BOT/Director of Admission	Investigate SEVP (Student Exchange Visitor Program) certification (Form I-17) Investigate J-1 Visa, F-1 Visa, I-20 or DS2019 Foreign Visit Program for Middle School foreign students	Research on foreign exchange programs for MS Students  <a href="https://studyinthestates.dhs.gov/site/about-sevis">https://studyinthestates.dhs.gov/site/about-sevis</a>  <a href="https://studyinthestates.dhs.gov/assets/initial_school_certification_user_guide.pdf">https://studyinthestates.dhs.gov/assets/initial_school_certification_user_guide.pdf</a>	N/A	2022 through 2024	