

# STRATEGIC PLAN



## KINGSLEY MONTESSORI SCHOOL

# Strategic Plan

In the next five years, Kingsley will be known as *the* school of choice in Boston for providing an academically exceptional education that fosters the development of each child into the fullest and most authentic version of themselves.

## INTRODUCTION: THE KINGSLEY EDUCATION MODEL

Kingsley is a tight-knit, diverse, and inclusive community of teachers, students, and families who value learning as a process and not a means to an end. A Kingsley education is rooted in a Montessori approach that cultivates an intrinsic love of learning by providing choice, fostering independence, and promoting respect for all. To accomplish these ends, Kingsley's model employs multi-age classrooms, stimulating prepared environments, highly-trained educators, and wide use of the city of Boston as an expanded classroom.

The priority of a Kingsley education is academic excellence, achieved through the development of unique Early Childhood and Elementary programs that integrate Montessori and progressive educational best practices. The goal of our academic program is for students to develop the knowledge, skills, and strategies required for success at and beyond Kingsley.

Of equal priority in a Kingsley education is the development of the whole person,

with an emphasis on leadership, empathy, initiative-taking, and collaboration. Learning environments at Kingsley are intentionally designed in physical setup and through cultural norms and routines to support the development of personal and social skills and individual passions that help students understand and better know themselves, their peers, and their world. A hallmark of the Kingsley education is the graduate who deeply knows who they are and who they are interested in becoming.

Successful execution of these priorities is, in large part, thanks to Kingsley's extraordinary faculty, who are experts at their craft and possess an unparalleled commitment to the cultivation and success of each student. The Kingsley education is enhanced by a co-teaching model and the unique opportunity for teachers to work with students for three consecutive years. The power of the Kingsley educational model lies in the intentionality of its design and its sustained commitment to meeting the needs of each Kingsley student.

## SCHOOL MISSION STATEMENT

Engage the mind, hands, and heart of each child to nurture resilient explorers, confident learners, and empathetic citizens.

## SCHOOL VISION STATEMENT



Academic Excellence.  
Empowered Learners.  
Kindhearted Leaders.

## PLAN DESIGN:

# Strategic Priorities

The Strategic Plan identifies four priorities that together address growth opportunities and meet the challenges of the next five years—a roadmap for ensuring the sustainability and continued success of the Kingsley community.

- I. THE KINGSLEY EDUCATION**
- II. A VIBRANT SCHOOL COMMUNITY OF CHOICE IN THE CITY**
- III. THE HEART OF THE SCHOOL: RECRUIT AND RETAIN EXTRAORDINARY FACULTY AND STAFF**
- IV. POSITIONED FOR THE FUTURE**

The priorities in this plan form a framework within which Kingsley has set thoughtful, strategic goals to further ensure and strengthen its mission fulfillment. While acknowledging that these priorities will require all of us at Kingsley to hold ourselves fully accountable for our work as educators, they will also inspire us and reaffirm what matters most: the importance of high-quality education for students and families during a foundational time of life.

Kingsley's Strategic Plan is also deeply informed by the example Dr. Maria Montessori set at the outset of developing her pedagogy and throughout her career serving first as the voice for the voiceless—women and impoverished children and families—and then as a leader in child-centered, research-informed education intended to affirm the dignity of all humans. Accordingly, Kingsley's commitment to diversity, equity, inclusion, and belonging overlays each of Kingsley's four strategic priorities with the belief that this commitment must be intentional and fully integrated into the fabric of this framework in support of the School's DEI Mission Statement.



### KINGSLEY'S DEI MISSION STATEMENT

A diverse, equitable, and inclusive community is integral to fulfilling our mission. Kingsley Montessori School strives to be a place where each person feels a sense of belonging and respect, recognizes and appreciates the richness that is added to our community through diversity, and is empowered to take action against injustices. We actively create such a community through our programming, our professional development, and our hiring, admissions, and governance practices.

*Approved by the Board of Trustees DEI Task Force in 2021*

**GOALS:**

1. Enhance the literacy, math, and science academic programs
2. Solidify the academic, Montessori, and social emotional learning (SEL) throughlines between divisions
3. Embrace a Kingsley education that is rooted in Montessori philosophy

**Goal 1. Enhance the literacy, math, and science academic programs****RATIONALE**

Kingsley's academic program is our reason for being, allowing us to nurture resilient explorers, confident learners, and empathetic citizens. We are committed to ensuring academic excellence for all students through the highest quality curriculum and pedagogy that meets the needs of our students and prepares them well for academic experiences beyond Kingsley.

As research and data continue to emerge about how students best develop reading, writing, and numeracy skills, Kingsley is committed to remaining up-to-date with that research, auditing current programs, and making revisions as necessary to ensure all students make academic progress at a rate that is appropriate for the individual child and aligned with standardized benchmarks.

Kingsley also acknowledges that the world is changing rapidly, making it essential for students to develop the critical thinking and flexible problem solving skills they will need to be successful in the future. Research supports that science programs are one of the best places for schools to support the development of these skills through inquiry and discourse.

All schools grapple with how to best allocate each minute of the school day to devote meaningful time to the many components of its programs, and Kingsley is no different. How Kingsley spends its time reflects the School's priorities for learning. Given the competing needs for time from all program areas, the faculty and administration should review the master schedule and flow of the academic day to ensure it meets the needs of students and teachers.

**INITIATIVES**

1. Partner with Lesley University's Center for Mathematics Achievement to review and refresh Kingsley's math benchmarks, curriculum scope and sequence, assessments, and pedagogical approach from Kindergarten through Grade 6. (underway as of July 2022)
2. Review and refresh Kingsley's literacy benchmarks, curriculum, scope and sequence, assessments, and pedagogical approach from Preschool through Grade 6, informed by internal data collection through standardized assessments. (underway as of Sept. 2022)
3. Review and refresh Kingsley's science benchmarks, curriculum, scope and sequence, assessments, and pedagogical approach from Kindergarten through Grade 6.
4. Optimize the school day by conducting a comprehensive schedule audit to identify opportunities for maximizing classroom learning and increased time for teacher preparation and collaboration.



## Goal 2: Solidify the academic, Montessori, and social emotional learning (SEL) throughlines between divisions

### RATIONALE

Kingsley is one school in two buildings, and a complete Kingsley Education consists of three unique programs (Toddler, Preschool, and Elementary). Each program builds upon the previous in intentional and essential ways, and the experienced educators in each division are highly skilled in their particular area. Indeed, 88 percent of our faculty and staff shared in responses to the Strategic Planning Survey that they admire and trust their colleagues. However, there were also recurring echoes during the planning process that revealed our teachers' shared desire to better understand their division's role in contributing to the educational outcomes of our ten-year program.

A unified culture and strengthened communications, particularly between faculty and staff and administrators, will help the School deliver a stronger academic program for its students. There are academic, Montessori, and social emotional learning (SEL) throughlines that already exist between programs. The School now must articulate, formalize, and socialize these throughlines via an easily understood framework. Teachers' increased collaboration and understanding across divisions about where students have come from and where they are going will strengthen these throughlines and ensure student readiness for the next year, especially at divisional transitions from Kindergarten to First Grade, Third to Fourth Grade, and Sixth to Seventh Grade.

### INITIATIVES

1. Ensure academic preparation from division to division by articulating a framework of throughlines - those areas central to the School's mission that express our values and are present in developmentally appropriate ways from Toddler to Sixth Grade. The framework will include academics, Montessori principles, and SEL.
2. Review and refresh Kingsley's Social Emotional Learning (SEL) benchmarks, curriculum, scope and sequence, and throughlines from Toddler through Grade 6, prioritizing perspective taking, responsible citizenship, empathy, self-confidence, and resiliency. (Underway as of June 2023)
3. Engage in schoolwide curriculum audit to ensure our curriculum is inclusive and representative of the experiences of all students.



## Goal 3: Embrace a Kingsley education that is rooted in Montessori philosophy

### RATIONALE

There is confusion within the internal and external community about the role that "Montessori" plays at Kingsley. While many faculty and families regularly share that they choose Kingsley as their school or workplace because it is a "Montessori school," the data suggests that there is a wide range of understanding about what it means to be a "Montessori school." There are also a significant number of families for whom our Montessori identity was not a deciding factor when enrolling.

For the sake of clarity, Kingsley must address the differences between Montessori philosophy and Montessori practices, which encompass the materials and curriculum designed by Maria Montessori during the first half of the twentieth century. Montessori philosophy begins with respect for the child and their ability to make meaning of their world. It is motivated by the belief that education should be child-led, individualized, inquiry-based, and multi-sensory. With these tenets, a Montessori education fosters intrinsic motivation, independence, self-advocacy, collaboration, curiosity, and a love of learning. Together, these elements comprise the backbone of a Kingsley education and the foundation upon which our program has been built though this is not synonymous with exclusive utilization of Montessori practices at Kingsley.

Our Montessori-rooted philosophy distinguishes us from other schools and yields powerful, positive results. Kingsley must confidently choose which practices to maintain and which to let go of, and then codify, articulate, and fully embrace those aspects of the Montessori philosophy and the Montessori practice that anchor our identity and our distinctive learning model.

### INITIATIVES

1. Clearly communicate, internally and externally, Kingsley's commitment to the Montessori philosophy by identifying our core values and throughlines, explaining their progression from Toddler through Grade 6.
2. Educate families about the value of "following the child;" multi-age classrooms; the prepared environment; uninterrupted work cycles; repetition; movement; freedom of choice; independence; and how learning through the Montessori philosophy sets our graduates apart from those who attended non-Montessori schools.

# A Vibrant School Community of Choice in the City

## GOALS:

1. Optimize our resources to be the school of choice in Boston
2. Increase retention and expand the enrollment funnel



## Goal 1. Optimize our resources to be *the* school of choice in Boston

### RATIONALE

Kingsley's location in the heart of Boston's Back Bay presents both opportunities and challenges for the School. Kingsley provides an exceptional, well-rounded education for children of the families who work and live in the city, making it possible for families to participate meaningfully in school events and activities. Over 70 percent of current Kingsley families live within walking distance of the School and a crucial part of our identity is a "neighborhood school." Kingsley places high value on parent partnership and opportunities exist to capitalize further on the reciprocity of the school/home relationship.

Unfortunately, the convenience and accessibility of our neighborhood location also imposes limitations in terms of our ability to provide on-campus facilities for athletics and access to adjacent outdoor spaces. During the strategic planning process, 31 percent of families cited athletics (PE classes, sports programs, etc.) as missing from Kingsley in their initial school search and 20 percent of families exploring Kingsley cited outdoor play space as lacking from Kingsley in their initial school search. Although neither limitation prevented these families from enrolling at Kingsley, and the School utilizes excellent PE and outdoor spaces nearby, anecdotal evidence from attrited families reveals that the School experiences some competitive loss when interest in these criteria appear again as children get older.

Boston is replete with opportunities for partnerships and experiences that enhance Kingsley's programs and offerings. It is in Kingsley's best interest to continue to take advantage of those opportunities, especially to address the limitations of its physical space, with the goal of providing a "one stop shop" experience for families, from before-school care to after-school care and enrichment programming. We also realize that opportunities to engage in lifetime fitness and team athletic opportunities are important components of a well-rounded education. Kingsley's value proposition through sixth grade must be clear and palpable and the School should embrace and leverage its location.

### INITIATIVES

1. Hire an Athletics Coordinator to establish a robust after school athletics program, consisting of partnerships with local organizations, organized team sports, and transportation for families. (underway as of July 2022)
2. Make better use of neighborhood and city resources to enhance educational and extracurricular experiences, including summer programs, to provide students with as many opportunities to pursue their interests/passions. (underway as of Sept 2022)
3. Leverage Auxiliary Programs to enrich the core curricular programs and pilot new initiatives. (underway as of Sept 2022)
4. The administration will partner with the Kingsley Parent Association to develop a robust parent education program that aligns with the School's mission and goals. (underway June 2023)
5. Develop a marketing plan that clearly and consistently defines and communicates Kingsley's value proposition and brand, in particular, the unique benefits of a Kingsley education and the successful next school outcomes for Kingsley graduates.

## Goal 2. Increase retention and expand the enrollment funnel

### RATIONALE

Kingsley's enrollment has grown exponentially over the past fifteen years. Kingsley has also more recently experienced a modest decline in enrollment as a result of the pandemic (2020-2021 academic year) and the increased number of families who relocated outside of the city. As such, Kingsley has focused concerted effort on retaining current families and expanding its enrollment funnel. Initiatives have included expanded outreach to potential Kingsley families, improved onboarding of new families, increasing the number of spots available in our Toddler and P3 programs, increasing family awareness about the value of remaining at Kingsley through Sixth Grade, and improving school to family communications. Monitoring the effectiveness of these efforts, and making strategic adjustments will be vital to ensuring the sustained health of the School.

Kingsley values its tight-knit community and has intentionally designed programs that ensure the low student-to-teacher ratio and individual approach inherent to Montessori education. Further, Kingsley enrollment is limited by the physical space that is available on its urban campus and research revealed that beyond a set capacity, the integrity of the programs would be compromised by increasing enrollment beyond a certain number. Kingsley should identify the "sweet spot" with its enrollment where physical space can be optimized, the quality of the program is preserved, and long-term efforts can be focused on maintaining rather than growing student enrollment.



### INITIATIVES

1. Analyze demographic (birth rates, housing, employment trends, etc.) and admissions (inquiries, applications, new enrollment, and attrition trends) to enlarge the applicant pool, meet demand where it is highest, and sustain a vibrant Elementary program.
2. Conduct a facilities audit to evaluate best usage of spaces in Exeter to optimize program offerings.
3. Use facilities audit to identify target enrollment range that maintains integrity of programs and informs a sustainable financial model based on the conservative end of the range.
4. Increase the amount of financial aid available annually.
5. Expand the diversity of Kingsley's community by developing a plan to strengthen the recruitment, retention, and support of underrepresented students, faculty, staff, and families.

# The Heart of the School: Extraordinary Faculty and Staff

## GOALS:

1. Strengthen professional development and evaluation
2. Maintain commitment to competitive compensation
3. Prioritize community belonging and wellness



## Goal 1. Strengthen professional development and evaluation

### RATIONALE

Families overwhelmingly cite Kingsley's teachers as the reason they continue to choose Kingsley as the school for their children. Kingsley knows that its greatest asset is its exceptional faculty. They are passionate, dedicated, and deeply committed to Kingsley's mission and their students. Kingsley teachers are experts at their craft. The three-year cycle provides a unique opportunity for families to develop meaningful relationships with their teachers in a way that becomes transformational for students.

Kingsley seeks to cultivate a culture of life-long learning for all constituencies and increase faculty/staff retention; as a result, it must prioritize learning for faculty and staff. In their responses to the Strategic Planning Survey, 50 percent of Kingsley faculty and staff report being somewhat or very satisfied with opportunities for professional growth. The landscape of education is changing rapidly, and it is essential that Kingsley support its teachers in staying abreast of current research and best practices. Additionally, as the School continues to evaluate and adapt academic programs to ensure continued excellence, it must provide sustained professional development for teachers. Finally, a strong supervision and evaluation system is paramount for maintaining teaching excellence and provides the supportive feedback that is both necessary and sought-after by faculty.

### INITIATIVES

1. Improve formal supervision and evaluation systems for faculty and staff.
2. Increase the amount of resources allocated for professional development.
3. Provide funding for advanced and graduate studies.
4. Provide DEIB learning opportunities for Kingsley faculty and staff.





## Goal 2. Maintain commitment to competitive compensation

### RATIONALE

Compensation ranked highest out of nine choices of faculty and staff benefits as the most important criteria when thinking about continuing to work at Kingsley. Currently, 68 percent of faculty and staff are somewhat or very satisfied with their compensation and 88 percent are somewhat or very satisfied with their benefits. The Kingsley parent community also confirms that effective, long-term, well-compensated faculty and staff are central to Kingsley’s future flourishing.

In the last ten years, Kingsley has made great strides in offering compensation in alignment with peer independent school salary benchmarks. With the shifts in the job market in the last two years, however, Kingsley must continue to prioritize competitive compensation and benefits in the independent school market in order to continue to attract and retain the highest quality faculty and staff.

### INITIATIVES

1. Conduct a compensation and benefit audit to ensure an effective, equitable, and sustainable approach to compensation.
2. Provide sustainable, competitive compensation and benefits for faculty that maintains our preferred position in the hiring market.



## Goal 3. Prioritize community belonging and wellness

### RATIONALE

According to Independent School Management, a national independent school research and advocacy organization, a healthy faculty culture is one of the major contributing factors to student satisfaction and achievement. The organization cites that predictability and support are keystones of a healthy faculty culture. Seventy-two percent of Kingsley faculty and staff report that they are somewhat or very satisfied with the community at Kingsley.

Factors that influence the community at Kingsley include communication, connection, and transparency between administration and other divisions, as well as adequate time for planning, peer-to-peer observations, and teaching team collaboration. Additionally, some faculty and staff report facing a challenge achieving a healthy work-life balance. It will be important for the School to identify and address pressure on that imbalance.

Kingsley strives to be a community where everyone, children and adults, knows they belong. Faculty and staff should be able to experience, collaborate with, learn from, and appreciate diverse perspectives. Prioritizing belonging will also contribute to greater feelings of satisfaction at work and increase staff retention.

### INITIATIVES

1. Develop a more robust onboarding plan and faculty mentor program for new hires. (underway as of August 2022)
2. Create opportunities for faculty and staff to connect across divisions and departments in Professional Learning Communities (PLCs) to strengthen vertical understanding of programs and outcomes. (underway as of August 2022)
3. Create a Health and Life Wellness Program for faculty and staff.
4. Increase funding for tuition assistance for faculty and staff.
5. Review and improve internal communication about and execution of processes and systems across school departments. (underway as of July 2023)
6. Expand the diversity of Kingsley’s community by developing a plan to strengthen the recruitment, retention, and support of underrepresented faculty and staff.

## Positioned for the Future

### GOALS:

1. Secure Kingsley's permanent home in the Back Bay
2. Secure funding to fulfill strategic initiatives
3. Re-engage, cultivate, and steward former leaders and donors



### Goal 1. Secure Kingsley's permanent home in the Back Bay

#### RATIONALE

Kingsley's location is cited as one of the top reasons why families choose Kingsley year after year. Kingsley currently owns the 30 Fairfield Street building and leases the second through fifth floor in the 26 Exeter Street building. Upon moving into 26 Exeter Street in 2005, Kingsley invested two million dollars in building improvements to begin transforming the former commercial space into a dynamic learning environment for Elementary students and a community hub for all Kingsley families. In 2015, the School initiated the Evolve capital campaign which raised an additional four million dollars to renovate Exeter and complete designing the spaces to meet the needs of our community and our innovative Elementary program.

The opportunity to purchase 26 Exeter Street is a once in a school's lifetime, foundational investment in our school's longevity. Owning this building will allow Kingsley to remain permanently rooted in the Back Bay and Boston and will ensure our capacity to nurture the limitless potential of successive generations of students as well as their own children, grandchildren, and great-grandchildren.

#### INITIATIVES

1. Purchase the 26 Exeter Street building.



## Goal 2. Secure funding to fulfill Strategic Initiatives

### RATIONALE

Independent schools regularly review resource allocation to ensure alignment with institutional priorities. As a non-profit organization, Kingsley takes great pride in its careful stewardship of its financial resources as well as its ability to adapt proactively to the evolving needs of the School. In fact, Kingsley has never been in a stronger financial position than where it currently sits.

Establishing an endowment would build upon Kingsley's financial stability and create opportunities for program improvement, staff retention, and increased accessibility and affordability for a more socio-economically diverse student body. Kingsley will need to optimize its resources in the present while simultaneously planning for the future, as it undertakes new initiatives, and an endowment would play a critical role in fueling these efforts.

### INITIATIVES

1. Launch and complete a Capital Campaign with the goal of raising funds to fulfill Strategic Plan initiatives, initially focusing on the purchase of 26 Exeter Street. (Quiet phase underway March 2023)
2. Develop a financial roadmap for each priority of the Strategic Plan, taking into consideration the implications of new initiatives on the current and short-term operating budgets while identifying potential new sources of revenue and/or ways to offset current expenses to achieve strategic priorities.
3. Establish an endowment for Kingsley.
4. Establish a more robust and strategic tuition assistance program.



## Goal 3. Re-Engage, cultivate, and steward former leaders and donors

### RATIONALE

Kingsley's active, major donor pipeline consists almost entirely of current parents. There are alumni families and non-alumni donors with significant giving history to the School that have not been engaged recently. Many of these families gave substantially to the Evolve campaign (2013-2018) and have not been stewarded effectively to be considered major gift prospects for a campaign at this time. Kingsley must re-engage philanthropic leaders, alumni families, and current and former grandparents to inspire these prospects to consider major giving to the School.

Alumni support is critical for the viability and sustainability of independent schools. Anecdotal evidence gathered at events for recent Kingsley alumni (graduates from 2018 forward) indicates that Kingsley graduates are quite successful. Many graduates credit their success to their foundational Kingsley education. They attribute their love of learning, their confidence, their ability to think critically, their ability to collaborate with others, their ability to manage how they use their time, and their self-advocacy skills to their experiences as Kingsley students. Additionally, recent outreach confirms that a high majority of Kingsley alumni feel affection and gratitude for their Kingsley education, a desire to deepen their connections to Kingsley, and a willingness to support the School after graduation.

Kingsley should take advantage of these positive responses by providing more opportunities to engage with alumni, celebrate their accomplishments, and cultivate lifelong relationships with the Kingsley community. Undertaking these efforts now, as the alumni body matures, will provide important opportunities for advancing the School's mission and deepening the philanthropic contributions of graduates and their families.

Finally, evaluating cultivation and stewardship strategies more broadly would strengthen advancement efforts at Kingsley.

### INITIATIVES

1. Consistently share personalized Kingsley updates including alumni stories that illustrate the School's long-term impact. (Underway as of spring 2023)
2. Increase engagement of alumni families in a volunteer capacity. (Underway as of 2023)
3. Host small events and gatherings on campus and in private homes. Increase alumni opportunities to visit classes, tour campus, and attend school events. (Underway as of fall 2023)
4. Enhance alumni outreach and engagement in the Advancement Office.
5. Establish a comprehensive alumni database.
6. Create an alumni organization with representatives, regular communication, social media engagement, and events.

# DIVERSITY, EQUITY, INCLUSION, & BELONGING (DEIB)

*at Kingsley*

## RATIONALE

The Strategic Planning Committee felt strongly that DEIB initiatives were integral components of all four strategic priorities of the Plan.

Diversity, equity, inclusion and belonging was **the** most frequent response when faculty and staff were asked during the strategic planning process to name the one element that they believed would help ensure Kingsley's future. Seventy percent of faculty and staff named DEIB as "very important" when thinking about continuing to work at Kingsley, second only to compensation and community.

Despite this, 23 percent of families shared (when asked in a Strategic Planning Survey) that DEIB was a missing piece of their school search criteria when they chose Kingsley, and only 26 percent of faculty and staff report that they are somewhat or very satisfied with DEIB efforts at Kingsley.

A strong DEIB program is important to our teachers and families and critical to nurturing empathy, confidence, and resiliency among our children in an increasingly interconnected world. Kingsley believes that its community is stronger with greater diversity and inclusion, and with increased opportunities for exposure, understanding, and learning from a variety of cultures and perspectives. Community members benefit from the opportunity to engage in civil discourse across differences. Kingsley also strives to ensure that every member of the community, faculty, staff, students, and families feel seen, known, and supported, and that they belong. To accomplish this, the School will continue to be open and intentional about how essential DEIB initiatives are to delivering Kingsley's mission.



## DEIB INITIATIVES

1. Appoint faculty DEIB Coordinators to work with school leadership to develop a framework for DEIB initiatives, including professional development, curriculum revision, and community engagement. (underway summer 2023)
2. Hire a Director of Diversity, Equity, Inclusion, and Belonging to oversee DEIB initiatives in partnership with school leadership to develop and oversee DEIB efforts in our community in order to be a more diverse, equitable, and inclusive school where everyone knows they belong.

# THE STRATEGIC PLANNING PROCESS

In the fall of 2019, Kingsley's Board of Trustees established a Strategic Planning Committee of trustees and school administrators with the aim of developing a firm understanding of Kingsley's strengths and challenges to overcome, embracing the values our community holds most dear, and identifying the characteristics that make us unique. Bookended by two Board retreats and straddling the COVID pandemic, Kingsley's Strategic Planning Committee identified eight areas of inquiry which it then refined into the four priorities identified in this plan. During the development of this plan, Kingsley's Strategic Planning Committee conducted demographic and contemporary education research and invited input from Kingsley's faculty, staff, and families via focus groups and surveys. This research was used to inform the priorities, goals, and initiatives of the Strategic Plan.

This Strategic Plan was approved by Kingsley's Board of Trustees in the spring of 2022. Since then, the administration has worked to "operationalize" the plan by determining the process and timeline for developing, implementing, and assessing the success of the specific initiatives identified in this plan.

## WHY IS STRATEGIC PLANNING A PRIORITY?

- A Strategic Plan allows a school to embody its mission, to strengthen community, and to move forward with clarity and confidence.
- A Strategic Plan positively impacts a school's admissions, retention, and fundraising efforts and ensures financial sustainability.
- "Best practice," according to the national association of Independent Schools (NAIS) Boards, is to "undertake formal strategic planning on a periodic basis, set annual goals related to the plan, and conduct annual evaluations for the School, Head of School, and the Board itself [based on this plan]."
- A Board-approved Strategic Plan is an accreditation requirement.

## COMMITTEE MEMBERS

### TRUSTEES

Alexis Rogers & Nik Shah, Committee Co-Chairs  
Tara Jordan, Board Chair

### STAFF

Steve Farley, Head of School  
James Bonsey, Associate Head of School for Finance & Operations  
David Liebmann, Assistant Head of School for Academics  
Tara Hofherr, Director of Elementary Education & Next School Counseling  
Peter Zetlan, Director of Early Childhood & Montessori Education  
Courtney Tomaselli, Chief Advancement Officer



**KINGSLEY  
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