In the fall of 2003, the LMS Board embarked on a strategic planning process to map the future direction of the Lexington Montessori School. Over the course of nine months, scores of parents, teachers, administrators, and Board members have thoughtfully considered challenges facing the school along a set of key dimensions, specifically Finance & Development, Program & Technology, Size & Structure, Space & Facilities, and Diversity & Community. Many more members of the community offered their input through surveys, forums, and faculty meetings. The result of this concerted effort is this 2004-2009 Long Range Plan.

In considering how the school could best fulfill its mission and thrive in the next five years, we adhered to values that form the bedrock of the institution:

- WE ARE AND WILL REMAIN A MONTESSORI SCHOOL.
- WE ARE COMMITTED TO OFFERING STUDENTS AN EXCELLENT EDUCATION.
- WE CHERISH THE RELATIONSHIP BETWEEN THE TEACHER AND THE CHILD AS THE CORNERSTONE OF AN LMS EDUCATION.
- WE REMAIN COMMITTED TO MAKING LMS AN OPEN, INCLUSIVE, MULTICULTURAL COMMUNITY THAT WILL TRANSFORM ITSELF AS FAMILIES FROM MANY DIVERSE BACKGROUNDS ENROLL IN THE SCHOOL.

We begin with a Statement of Priorities that sets forth the goals and activities to which the Board and Administration will devote resources. The order of these priorities reflects the Board’s belief that only with a strong financial foundation can LMS continue to meet the needs of its children, faculty, staff, and families.

This Plan serves as a statement of direction and will be refined pending upcoming Board decisions on issues, such as the size and structure of the school. The Board President and Head of School will evaluate progress on the goals and initiatives in this plan on an annual basis and will report to the Corporation at each annual meeting.
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PLANNING PARTICIPANTS
he Lexington Montessori School community works to create an environment that inspires children to develop inner discipline, self-assurance, and a love of learning. We respect the uniqueness of each student by helping each child to develop skills at periods of greatest readiness and sensitivity.

Our program provides a creative, adaptive environment that responds to the needs of the children. We seek to balance academic and social development to foster responsibility and cooperation within a supportive learning community.

Our students learn to view themselves as contributing members of a diverse global community. We respect and value differences, and look with an open mind at all members of the community, seeking to understand and value them for who they are. The staff, the parents and the children communicate clearly and openly and treat each other with honesty and mutual respect.

THE LMS MISSION STATEMENT
STATEMENT OF PRIORITIES

The LMS Board and Administration will address the following goals as immediate strategic priorities:

- Strengthen the School’s financial position.
- Investigate changing the size and structure of the school.

The following three goals and associated initiatives will be considered important priorities:

- Attract and retain excellent, diverse faculty and staff.
- Ensure adequate facilities for the school.
- Foster an LMS community that is pluralistic, strong, and inclusive.

Over the course of the next five years, the school will continue to . . .

- Respond to the needs of children by enriching our program.
- Reconcile LMS’ technology infrastructure with the school’s needs and remain on track for future system administration and growth.

“Only with a strong financial foundation can LMS continue to meet the needs of its children, faculty, staff, and families.”
THE GOALS OF THE LONG RANGE PLAN

STRENGTHEN THE SCHOOL’S FINANCIAL POSITION

- BUILD A GENERAL ENDOWMENT.
- CONSIDER CHANGING THE SIZE AND STRUCTURE OF THE SCHOOL.
- EXAMINE NEW WAYS TO BRING REVENUE TO THE SCHOOL.

LMS today is financially sound because of its ability to generate steadily increasing revenue through enrollment and tuition growth. At the same time, the school carries large debts relative to the school’s assets, a legacy of when the school built the Jane Mack Building and purchased the Lawrence Lane properties through borrowed funds rather than raised capital.

As LMS moves forward, funding competitive salaries and benefits for its staff, enriching our program, and maintaining our commitments to financial aid and to diversity will require additional financial resources. Furthermore, the school is unlikely to be able to fund substantial new capital investments through additional borrowing.

To improve the school’s financial stability, the Long Range Plan calls for a three-pronged approach: 1) build a general endowment, 2) consider changing the size and structure of the school and 3) examine revenue enhancing opportunities.

A general endowment will give the school financial flexibility while keeping it as affordable as possible to families through modest tuition growth. Without an endowment, LMS remains vulnerable to small fluctuations in enrollment. The Plan recommends the endowment be established as part of a broader capital campaign that will likely involve expanding the elementary program, adding additional classrooms and enhancing the physical plant.

Although growing the school would require funding start-up costs in the early years, ultimately the school would operate with greater economies of scale. At a total enrollment of less than 300, LMS would still be considered a small school. It would, however, have a larger pool of families with children enrolled in the school for a longer period making for a stronger development program and more affordable tuitions. (Specific options for changing the size and structure of the school are discussed on pages 6 and 7.)
Finally, the Long Range Plan calls for examining new opportunities to bring revenue to the school that leverage LMS’ outstanding reputation and its fixed assets.

**Key Initiatives**

**Design and Implement a Multi-Year Capital Campaign to Establish a General Endowment and Fund a Building Initiative for Expansion and/or Enrichment.**

**Examine New Ways to Bring Revenue to the School:**

- Develop more programs for existing students outside of regular school hours
- Develop programs for non-LMS students taking advantage of the school’s reputation and infrastructure
- Offer a year-round, full-day preschool class

*Goal Supervised by Board of Directors and Implemented by Head of School and Director of Development*
INVESTIGATE CHANGING THE SIZE AND STRUCTURE OF THE SCHOOL

- Add an additional 6-9 classroom.
- Add a Middle School (7th & 8th grades)

There are several compelling reasons to consider changing the size and structure of the Lexington Montessori School. An increasing number of Children’s House parents plan to enroll their children in the Elementary Program and, while the school is committed to providing places for these children, our Lower Elementary Program is currently smaller than our Children’s House program. Should all our Kindergarten students enroll for our first grade, we would not have adequate space for them. Adding an additional 6-9 classroom in the elementary building would allow us to accommodate this demand as well as take strong applicants from local Kindergartens.

At the same time, parents have expressed interest in extending the benefits of a Montessori education into 7th & 8th grades. In the Long Range Plan parent survey, 65% of parents suggested that they were likely to send their child to an LMS Middle School. The introduction of a Middle School would make LMS into an “elemiddle” school, a model championed by many educators as the best for gently transitioning children into young adulthood. Furthermore, the creation of an LMS Middle School is consistent with both LMS’ mission and educational philosophy.

The lack of an LMS Middle School appears to be an increasingly important factor in the decision of some families not to enroll their children in Upper Elementary, to withdraw them early, or not to enroll in LMS at all. Given the sensitivity of our cost structure to enrollment, making sure LMS remains an attractive option to our students and their families is critically important.

At the writing of this document, LMS is undertaking a feasibility study to better understand the benefits and costs of adding 7th and 8th grades.

“Making sure LMS remains an attractive option to our students and their families is critically important.”
Key Initiatives

CONDUCT FURTHER FINANCIAL ANALYSIS ON ADDING A FOURTH 6-9 CLASSROOM.

CONDUCT A FEASIBILITY STUDY ON THE BENEFITS AND COSTS OF LAUNCHING AN LMS MIDDLE SCHOOL, INCLUDING:

Demand analysis
Scenario modeling
Start-up cost modeling
Implementation modeling, including program specifications and human resources and leadership requirements
Timeline and dependency modeling
Sequencing with the addition of a fourth 6-9 classroom

Goal Supervised by Board of Directors; Implementation Study by Head of School and Director of Faculty and Curriculum Development
Together the teachers and administrators of the Lexington Montessori School represent the school’s greatest asset. Recognizing the competitive market for talented teachers in the Greater Boston area and the relatively small supply of Montessori-trained teachers (as a percentage of the teaching population), the Long Range Plan maintains the school’s focus on offering faculty and staff competitive compensation and benefits as well as a positive work environment. The Plan calls for paying particular attention to features identified by LMS teachers and CMTE (Center for Montessori Teacher Education) candidates as important in attracting/retaining faculty to their positions. Teachers more often ranked the philosophy of the school as being the most important factor, followed by salary, a sense of being valued, and the community of the school.

Faculty of color remain underrepresented in our school, comprising 17.1% of the staff teaching a population with 43.3% children of color. Since diversity is a critical element in the mission of the school and must be present in the staff as well as the students, LMS must strengthen recruitment efforts to attract/hire more faculty of color.
The faculty teaching Art, Library, Music, Physical Education, and Spanish (known as Specialists at LMS) deeply enrich the lives of our children and are crucial to achieving the Montessori goal of educating the whole child. To strengthen our program and attend to teacher satisfaction, the administration will examine the role of specialists in the curriculum, paying particular attention to scheduling, staffing, and space needs.

**Key Initiatives**

**ACHIEVE COMPETITIVE SALARY AND BENEFITS PACKAGE FOR FACULTY AND STAFF:**

*Provide a salary scale that is equivalent to 80% of the regional public school salary scale and within the top 10% of local Montessori schools' salaries*  
*Maintain a quality benefits package*

**MAINTAIN A POSITIVE WORKING ENVIRONMENT FOR FACULTY AND STAFF:**

*Clearly articulate the school’s mission and philosophy when hiring*  
*Strengthen the professional mentoring, curriculum and materials sharing, and faculty opportunities for meaningful contribution to the direction of the school*  
*Build the alliance between parents and faculty, by educating parents and faculty on the school/parent partnership and utilizing the Parents Association and Room Parents to strengthen the link between parents, the classroom, and the school*

**HIRE AND MAINTAIN A TEACHING STAFF WITH 35% PEOPLE OF COLOR:**

*Build faculty recruitment efforts at local colleges and universities that offer education degrees and have student populations that are diverse racially, ethnically, and socio-economically. Build partnerships with one or two of these institutions to identify and recruit teaching assistants and future teachers*

**EXAMINE THE LONG-TERM ROLE OF SPECIALISTS AT LMS:**

*Address scheduling needs*  
*Ensure adequate staffing*  
*Ensure adequate space*

*Goal Supervised by Head of School and Board of Directors*
ENSURE ADEQUATE FACILITIES FOR THE SCHOOL

- ENHANCE SPECIALS SPACE.
- CONSIDER ADDITIONAL CLASSROOMS.
- ADDRESS SAFETY AND SECURITY OF THE CAMPUS.

With funds from a successful capital campaign, LMS aims to address several pressing space and facilities needs at the school. Although classroom space at LMS is generous and thoughtfully designed to meet the needs of our children, the space for specials in the elementary building is inadequate. The music room doubles as a Before and After School space. The Spanish classroom space is very limited and does not accommodate a full-range of programmatic activities. The existing Library is at capacity and needs to be expanded. As we consider adding 7th & 8th grades, we must also evaluate the need for dedicated space for science as well as improvements to our physical education facilities. In a community-wide survey conducted during the 2002-2003 school year, 52% of respondents said more space was needed for Specials and 68% said the quality of specials space needs improvement.

Going forward, the school hopes to expand the elementary building to provide adequate space for library, art, music, and Spanish. Pending the outcome of analysis regarding an additional 6-9 classroom and the Middle School feasibility study, this expansion could include classroom space for these initiatives.

With any increase in the number of classrooms, LMS will, by law, need to address requirements for parking. Expanded and redesigned parking and traffic flow will improve safety and convenience for LMS families.

To preserve long-term flexibility in campus and facilities planning, LMS plans to continue to own 10 and 12 Lawrence Lane. Should LMS launch a fourth 6-9 classroom or a Middle School, a renovated 12 Lawrence Lane could provide interim housing for classroom space. In the long term, the properties could be the site for additional athletic facilities or a common building that would serve as a community meeting space. Currently, 10 Lawrence Lane (the Green House) houses administrative offices and meeting space. 12 Lawrence Lane is being rented. Plans to expand and renovate the elementary building are contingent upon the progress of an LMS Capital Campaign.
Key Initiatives

RENOVATE 12 LAWRENCE LANE TO PROVIDE INTERIM CLASSROOM SPACE.

EXPAND AND REDESIGN THE ELEMENTARY BUILDING:

Build an additional 6-9 classroom on the first floor
Add a second floor to the existing one story, Lower Elementary area
Renovate a portion of the first floor

ADDRESS SAFETY AND SECURITY ISSUES AS THEY RELATE TO STUDENT AND TRAFFIC FLOW, PARKING, AND SECURITY OF THE CAMPUS.

Goal Supervised by Board of Directors and Head of School
Parents, teachers, children, and staff collaborate in the education of each child at LMS. Collectively, we form a cooperative learning community.

Believing that our children will live their most productive years in a world which is multicultural, multilingual, and heterogeneous in every aspect, LMS has attracted a diverse set of families from a range of racial/ethnic origin, religious affiliation, sexual orientation, marital status, and socio-economic backgrounds. The school aims to reflect this diversity in its teachers, who are guides and role models for learning. To prepare our children to contribute to a global community, we have brought together...
voices reflecting a kaleidoscope of thoughts and experiences. It is in the presence of these varied per-
spectives that all of our children will learn critical thinking skills as well as respect for the individu-
ality of others.

To ensure that LMS remains a thriving community, the Long Range Plan calls for conducting an
assessment to understand how well the school is serving its various constituents, namely its families,
teachers, and staff. Particularly, we hope to understand who feels ownership in the community, who
feels marginalized, and why. Understanding how the full range of members experience the communi-
ty will help LMS build strategies for inclusiveness that support our school/family partnership.

This school/family partnership is crucial to sustaining our learning community. The Parents
Association organizes activities that build community, support the school financially, and afford
parents the opportunity to participate in the education of our children. Parents further support the
school through annual giving which contributes 6% yearly to the school’s operating budget. The
generosity of parents is essential to the success of the school. If LMS is to reap the full rewards of its
diversity, we must create an environment in which all families have opportunities to participate
meaningfully in school life.

Finally, the Plan upholds the Board’s 2003 Diversity Goals and recommends specific strategies
for implementation.

Key Initiatives

CONDUCT AN ASSESSMENT OF THE STATE OF THE COMMUNITY.

SPECIFICALLY TARGET NEARBY COMMUNITIES WITH RACIAL/ETHNIC AND SOCIOECONOMIC
DIVERSITY FOR STUDENT RECRUITMENT.

Goal Supervised by Board of Directors and Head of School
MS provides a dynamic learning environment that responds to the needs of children. Going forward, we will enhance this environment to better address learning differences within the student body. Statistics indicate that between 20-25% of children in independent schools may have some type of learning difference. (Examples of learning differences include dyslexia, ADD, ADHD, non-verbal learning disorder, etc.) Since LMS admits students at an early age before much is known about their learning, it is particularly important that we be able to identify and diagnose learning differences. Early intervention will help our students build coping mechanisms that will support academic success and bolster self-esteem. During the next five years, educators at LMS will design and implement a program to systematically address learning differences in a developmentally sensitive, child-centered manner.

Over the five-year period, we will integrate technology into our curriculum in a developmentally appropriate manner. In the long-range planning survey, a preponderance of parents felt that it was important or very important to have software-based productivity tools (68% of parents), additional technology-based activities (60% of parents), and keyboard skill training (75% of parents) in the elementary program. Technology will only be used where it can provide a unique benefit to the existing curricula, providing a greater impact on learning than was present or possible prior to its introduction. The addition of technology will be done thoughtfully and within the Montessori framework.

We will also address the developmental needs of young three-year-olds, who can require considerable attention, particularly at the beginning of the school year. Early attention to young threes provides an easier transition for these children and enables smooth classroom operations.

During the next five years, the school aims to improve our program by broadening the way we deliver our science curriculum to include inquiry-based science activities and installations in the school environment. As children interact with indoor and outdoor installations designed to provoke questions about scientific concepts, they spontaneously explore science at work in their environment. The students’ guided curiosities lead them on a path to discovering the laws of nature.
Key Initiatives

INVEST RESOURCES IN A FORMAL PROGRAM TO EFFECTIVELY IDENTIFY AND TEACH CHILDREN WITH LEARNING DIFFERENCES:

Assess our current approach. Determine which learning differences can be addressed within the scope of a Montessori classroom and which are better handled in a different environment

Invest in resources to identify and to evaluate children with special learning needs and to help families find appropriate learning specialists

Train faculty to recognize learning differences

RESPONSIBLY INTEGRATE TECHNOLOGY INTO THE CURRICULUM NOW AND IN THE FUTURE:

Create and adopt LMS’ technology philosophy and position statements

Create an academic technology plan articulating technology usage by program and grade level and identifying minimum technology core competency skills for graduating students

Form a Faculty/Administrative committee to implement approved initiatives

Design and implement an equal access policy and program for students who do not have technology access at home. Consider gender and socio-economic issues as they relate to equal technology access

IMPROVE THE TRANSITION OF YOUNG THREES:

Investigate recruiting master’s program students for three-month internships in a 3-6 classroom during the fall semester, so the head teachers can give more attention to the needs of the young three-year-olds

Explore creating a paid “floater” position to support 3-6 classrooms on a rotating schedule each weekday with specific transition issues that three-year-olds present

Consider creating a summer program for three-year-olds that would prepare them for September’s start of school

ADD INQUIRY-BASED SCIENCE MATERIALS TO THE SCHOOL ENVIRONMENT:

Create community-based partnerships with local museums to design and prepare a school-wide environment for spontaneous inquiry

Identify core principles/concepts

Learn about installations (as distinct from demonstration materials and practice activities) intended to provoke inquiry. Create a portfolio of installations including permanent and traveling installations, outdoor and indoor installations

Manage the design, construction, and pedagogy associated with the installations

Secure funding for this collaborative project

Goal Supervised by Head of School and Director of Faculty and Curriculum Development
Since the last Long Range Plan, the LMS community has come to rely heavily on technology for communication and for the efficient operations of the school. E-mail has become a ubiquitous and necessary means for faculty, staff, and parents to communicate about classroom activities, student information, and volunteerism. Teachers use their computers to prepare lessons, document student progress, prepare reports, and for Internet research. Staff and administrators rely heavily on database technology to manage admissions, enrollment, donor populations, and the school population at large.

Furthermore, as an independent school, LMS conducts technology-based marketing and admissions outreach. During the past year, we have committed resources to revamp our website which launched in March 2004.

Given our reliance on technology for the smooth operations of the school, it is imperative that LMS have a sound technology infrastructure. A recent assessment of our infrastructure has uncovered urgent needs for upgrades and for adequate staffing, support, and training to sustain the system. The plan calls for addressing these issues and for bringing Technology into a formal Board/Administration oversight and planning process.
Key Initiatives

IDENTIFY KEY SYSTEM STREAMLINING AND UPGRADE ISSUES:
Complete server and cable upgrade
Determine priorities and complete proposal for remaining infrastructure improvements
Define “acceptable system-quality level” in alignment with adopted technology philosophy and position statements and create on-going formal review process to monitor and maintain agreed upon system-quality level

UNDERTAKE ANALYSIS TO DETERMINE STAFFING, SUPPORT, TRAINING, AND BUDGET REQUIRED TO ADEQUATELY SUSTAIN INFRASTRUCTURE. IN PARTICULAR, DETERMINE I/S PERSONNEL NECESSARY TO SUPPORT SYSTEM AND EXPECTATIONS.

INTEGRATE TECHNOLOGY INTO FORMAL BOARD/ADMINISTRATION OVERSIGHT AND PLANNING PROCESS.

ESTABLISH GUIDELINES FOR PLANNING EXPANSION/ALTERATION OF CURRENT SYSTEMS THAT INCLUDE SYSTEM IMPACT ANALYSIS AND ADHERE TO LMS TECHNOLOGY PHILOSOPHY STATEMENT (STILL TO BE WRITTEN) AND LMS POSITION REGARDING TECHNOLOGY AND ITS USE.

PROVIDE THE NECESSARY PERSONNEL TO SUPPORT TECHNOLOGY INITIATIVES.

ESTABLISH A SMALL ADMINISTRATIVE/STAFF COMMITTEE TO IMPLEMENT APPROVED INITIATIVES.

Goal Supervised by Head of School and Board of Directors

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