



**AMI
USA**

**ASSOCIATION
MONTESSORI
INTERNATIONAL**

Strategic Plan 2023–2027



Mission

Association Montessori International of the United States (AMI/USA) is dedicated to bringing the principles of Dr. Maria Montessori to the education of children through its support and advancement of the AMI Montessori community in the United States.



From the Executive Director

“Do the best you can until you know better. Then when you know better, do better.”

This quote, attributed to the legendary Maya Angelou, aptly describes, in my estimation, AMI/USA’s positionality over the last few years. Now we aim to emerge from the triple pandemic evils of COVID-19, economic recession, and practices of injustice, which rightly demand that we “do better.” This strategic plan is our earnest endeavor to do better for the children, families, teachers, and schools that we serve on this “path of life.” In fact, the prescient words of Dr. Maria Montessori offer us some instructive guidance, when she says, “We shall walk together on this path of life, for all things are part of the universe and are connected with each other to form one whole unity.”

Strategic planning, by one definition, is a process used to identify goals, strategies, necessary resources, and mechanisms for evaluating progress. For AMI/USA, this important process was even more critical since our last strategic planning process was not fully completed. To inform this new strategic plan, we secured and studied survey input from more than 500 members and integrated AMI global’s strategic planning guidance with the input of our Board, staff, and external consultants. I believe the resulting roadmap will advance AMI/USA towards “better.”

I am truly grateful for the expertise of Girl on the Roof, our Board of Directors, members, and staff, who collectively mobilized to develop this strategic plan, and I look forward to the “better” AMI/USA that we will become as a result.

Onwards,

A handwritten signature in black ink, appearing to read 'Ayize Sabater', written in a cursive style.

Ayize Sabater
Executive Director, AMI/USA



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Positioning Statement

At AMI/USA, we believe in the transformational power of Montessori education. As a legacy organization, AMI/USA builds upon Montessori principles and pedagogy to meet the evolving needs of children, families, and educators. Through collaboration, research, resources, and advocacy, AMI/USA advances high-quality, accessible Montessori education for children in the United States.



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AMI/USA History

At the behest of Mario Montessori, Margaret E. Stephenson came to the U.S. in 1960 to train Montessori teachers. Over the following decade, Miss Stephenson served as the primary AMI representative for the United States, answering queries of all kinds, helping open schools, and giving workshops. During this time, she founded and was director of training for the Washington Montessori Institute (WMI). As the needs in the Montessori movement grew, and as WMI became increasingly identified with AMI, Miss Stephenson suggested that a separate organization be set up to serve the advancement of AMI in the United States. In 1972, AMI/USA was founded as a branch office of “AMI global,” which is headquartered in the Netherlands. In 2011, AMI/USA transitioned to become AMI’s primary operational affiliate in the United States, granting AMI/USA a degree of autonomy to respond to the needs of the AMI Montessori Community in this country.

Today AMI/USA is a vital operation, ever-evolving to serve Montessori educators, families, and children while advancing high-quality, accessible Montessori education in this country. The organization has expanded to provide training, support, and vision to more than 3,000 members.

The principal purposes of AMI/USA include carrying forward the legacy and principles of Dr. Montessori to meet the current needs of children, families, and educators; and advancing high-quality, accessible Montessori education. Leadership on pedagogical matters comes from AMI global, which performs vital tasks worldwide, such as clarifying understanding of Montessori principles through discussion and writing, resolving pedagogical questions, establishing and enforcing training standards, and disseminating genuine Montessori wisdom. AMI/USA assists AMI global in this effort through financial support (from school recognition fees, membership fees, and conferences), the administration of certain programs, and counsel regarding affairs in the United States.

Among AMI/USA’s central ongoing functions are the administration of school recognition and school consultation programs, review and recommendations to AMI global concerning proposed new teacher training courses, sponsorship of AMI professional development programs for Montessori educators and leaders, and counsel to AMI global on potential solutions to challenges faced by Montessori educators in the USA. In addition, AMI/USA formulates and administers various programs including the training of consultants and the preparation of print materials for training centers and schools.

AMI/USA Board Members

KaLinda Bass-Barlow, Board Chair — Executive Principal, Border Star and Holiday Montessori, Kansas City Public Schools

Jordan Gordon, Board Treasurer — Chief Human Resource Officer, Kansas City Public Schools

Alva Waller Dial, Board Secretary — Chief Executive Officer of Legal Resolutions Inc.

Jacqui Miller, HRSJ Committee Chair — Director of Montessori Programming and Operations, Cleveland Metropolitan School District

Dallas Nelson, Governance Committee Chair — Director of Lakota Language & Education Initiative at Thunder Valley Community Development Corporation on the Pine Ridge Reservation

Tim Nee — Director of Satellites and Special Projects, Montessori Training Center Northeast

Michelle Becka — Teacher Education Designer and Instructor, Bezos Academy

Frank Vincent — Retired HOS, Mentor Coach, InserviceMontessori.com



Strategic Planning Process Overview

In the middle of 2022, AMI/USA initiated the process to develop a five-year strategic plan. The process began with a survey of AMI/USA members, which was designed to assess opinions and challenges within and beyond the classroom. The data from this survey was referenced by AMI/USA throughout the strategic planning process.

In October and November of 2022, strategic marketing firm Girl on the Roof facilitated strategic planning sessions with AMI/USA staff and Board of Directors. Through that process, three key pillars were identified:

- **Brand, Culture, and Leadership**
- **Capacity and Sustainability**
- **Programming and Partnerships**

Teams, comprised of staff and Board members, were formed to determine outcomes and develop action plans for each pillar. Each completed action plan contained SMART (Specific, Measurable, Achievable, Realistic, and Time-oriented) tasks with champions, completion dates, and anticipated costs. The content included in this document is a condensed version of the final strategic plan, which is comprised of the three pillar action plans.

Because all facets of an organization are inter-related, it is natural for overlap and redundancy to occur in the planning process. AMI/USA crafted a vision-casting framework to help reduce this redundancy across pillars.

- **Brand, Culture, and Leadership** looks outward to lead the Montessori movement in the United States.
- **Capacity and Sustainability** looks inward to maximize resources and impact
- **Programming and Partnerships** looks across to collaborate for high-quality and accessible Montessori education

Evolving to Meet Current Needs

Many of the outcomes in the strategic plan focus on assessing and addressing the challenges faced by today's Montessori educators, families, and children. While AMI/USA holds firmly to the principles and pedagogy of Dr. Maria Montessori, the organization's staff and Board believe that those principles can and should be responsive to present-day needs. Simply put, we know more today about learning differences and neurodiversity

than Dr. Montessori did. Consequently, we believe that educators need additional resources and training to ensure that every child has the opportunity to succeed.

Anchored in Core Values

A critical component of the first pillar was the formation of core values to guide the organization and its efforts. See below for the new AMI/USA core values. Additionally, a positioning statement was crafted to more effectively communicate the organization's mission, scope, and services. That statement appears on Page 3 of this document.

Accountability

In order to ensure accountability for the plan's implementation, a system for internally tracking and reporting on the plan's progress will be integrated into staff and Board meetings. This will help ensure that the plan will truly be implemented.

Additionally, AMI/USA will be more intentional than ever about communicating with our members and partners on the progress and outcomes we achieve related to this plan. We look forward to working with and for educators, families, and partnering organizations within and beyond the AMI family as we seek to ensure more children and families have access to high-quality Montessori education.



AMI/USA Core Values

- ① We respect children and believe that accessible, high-quality Montessori education expands opportunities for ALL children and the adults they will become.
- ② We believe that Montessori principles and pedagogical practices must be responsive to the evolving needs of children, families, and educators.
- ③ We strive to model and advance the principles of justice, equity, diversity, inclusion (JEDI), anti-bias, and anti-racism (ABAR).
- ④ We demonstrate hope, courage, authenticity, compassion, and respect and extend and receive grace when we fall short.

AMI/USA Strategic Pillars for 2023–2027



Brand, Culture, & Leadership

LOOKING OUTWARD and leading the movement in the U.S.



Capacity & Sustainability

LOOKING INWARD and maximizing resources and impact



Programming & Partnerships

LOOKING ACROSS and collaborating for quality and accessibility





Brand, Culture, & Leadership

LOOKING OUTWARD and leading the movement in the U.S.

OBJECTIVE

Develop a compelling brand that positions AMI/USA as a thought and action leader for accessible, high-quality Montessori education in the U.S.

OUTCOMES & OVERVIEW of ACTION STEPS

- ① AMI/USA policies and procedures reflect and support the organization's core values, which demonstrate an organizational commitment to JEDI/ABAR. (2024)
 - Establish a new set of AMI/USA core values (See Page 6) and develop tools and processes to use those core values to drive decision-making.
 - Conduct an equity analysis of the organization; make changes where needed.
 - Communicate progress and emerging practices with members and partners.

- ② AMI/USA staff and Board members agree that core values are embraced and practiced within the organization. (2025)
 - Survey staff and Board members.
 - Develop and implement tools and processes to engage staff and Board in ongoing reflection, self-assessment, and growth related to core values.
 - Provide ABAR/JEDI and Montessori pedagogy training for staff and board.

- ③ Responding members agree that AMI/USA effectively advocates for accessible, high-quality Montessori education in the U.S. (2026)
 - Survey members annually to assess needs and effectiveness.
 - Develop a marketing plan to communicate actions and progress.



Capacity & Sustainability

LOOKING INWARD and maximizing resources and impact

OBJECTIVE

Expand organizational capacity to advance the AMI/USA mission and ensure financial sustainability.

OUTCOMES & OVERVIEW of ACTION STEPS

- ① Members and staff agree that AMI/USA responds effectively to the needs of our members. **(2027)**
 - Develop and implement a system to evaluate and maximize staff productivity and organizational effectiveness and capacity.
 - Capture and evaluate member and staff feedback on this outcome.

- ① Sufficient financial resources are available to advance the AMI/USA mission and strategic priorities. **(annually)**
 - Develop a multi-year financial plan to address resource needs, expand capacity, and identify new revenue streams.
 - Ensure cost of services aligns with value proposition.
 - Set annual growth-focused goals for membership, The Montessori Experience Conference, and the AMI Recognition Program.
 - Increase capacity to secure grants.
 - Advance a culture of philanthropy.



Programming & Partnerships

LOOKING ACROSS and collaborating
for quality and accessibility

OBJECTIVE

Develop programs and win-win partnerships that increase community engagement; leverage innovative solutions to meet the current needs of schools, educators, children, and families in public and private sectors; and support the retention and recruitment of more — and more diverse — educators and families.

OUTCOMES & OVERVIEW of ACTION STEPS

- ③ Strategic partnerships advance accessible, high-quality Montessori education and attract broader — and more diverse — audiences to Montessori education. (2026)
 - Develop and implement an intentional strategy with AMI Global and AMI affiliates to better assess and address the needs of Montessori educators, schools, and children in the U.S.
 - Build strategic partnerships that advance and support high-quality, accessible Montessori education in the U.S.
 - Develop and implement an intentional strategy with AMI Training Centers in the U.S. to promote and support AMI diploma and certificate courses.
 - Provide resources, coaching, webinars, etc. to support schools in developing strategies to sponsor more educators.

- ③ Support/sponsorship of at least seven AMI/USA research studies that examine and/or advance advocacy efforts for accessible, high-quality Montessori education. (2025)
 - Develop tools and processes for identifying, initiating, and evaluating research proposals.
 - Provide a platform for researchers to share their work.

🎯 Responding members state that AMI/USA's resources and programs support the needs of schools, educators, children, and families. (2027)

- Establish standing committees to engage members in identifying and addressing the needs of schools, educators, children, and families.
- Collect, analyze and respond to feedback from members pertaining to the needs of schools, educators, children, and families.
- Enhance the website to more effectively support stakeholders' needs.
- Develop, implement, and evaluate professional development opportunities and resources to meet current needs of Montessori educators, including those focused on:
 - Neurodiversity and learning differences
 - Social-emotional development
 - Trauma-informed practices
 - Parent education/partnerships
 - Work and support of assistants
 - ABAR/JEDI
- Sponsor and/or promote professional development opportunities to address the needs of school administrators, including the AMI Administrator Certificate Course.





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The staff and Board of Directors of AMI/USA are grateful for the dedication of Montessori educators and families. We look forward to working *with you* and *for you* as we implement our strategic plan over the next five years. We welcome your input and suggestions for expanding high-quality, accessible Montessori education.



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