



# MONTESSORI INSPIRED LIFESTYLE®

CREDENTIALING HANDBOOK  
FOR EMPLOYEE ENGAGEMENT



# GUIDE TO GETTING STARTED

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# OUR PHILOSOPHY

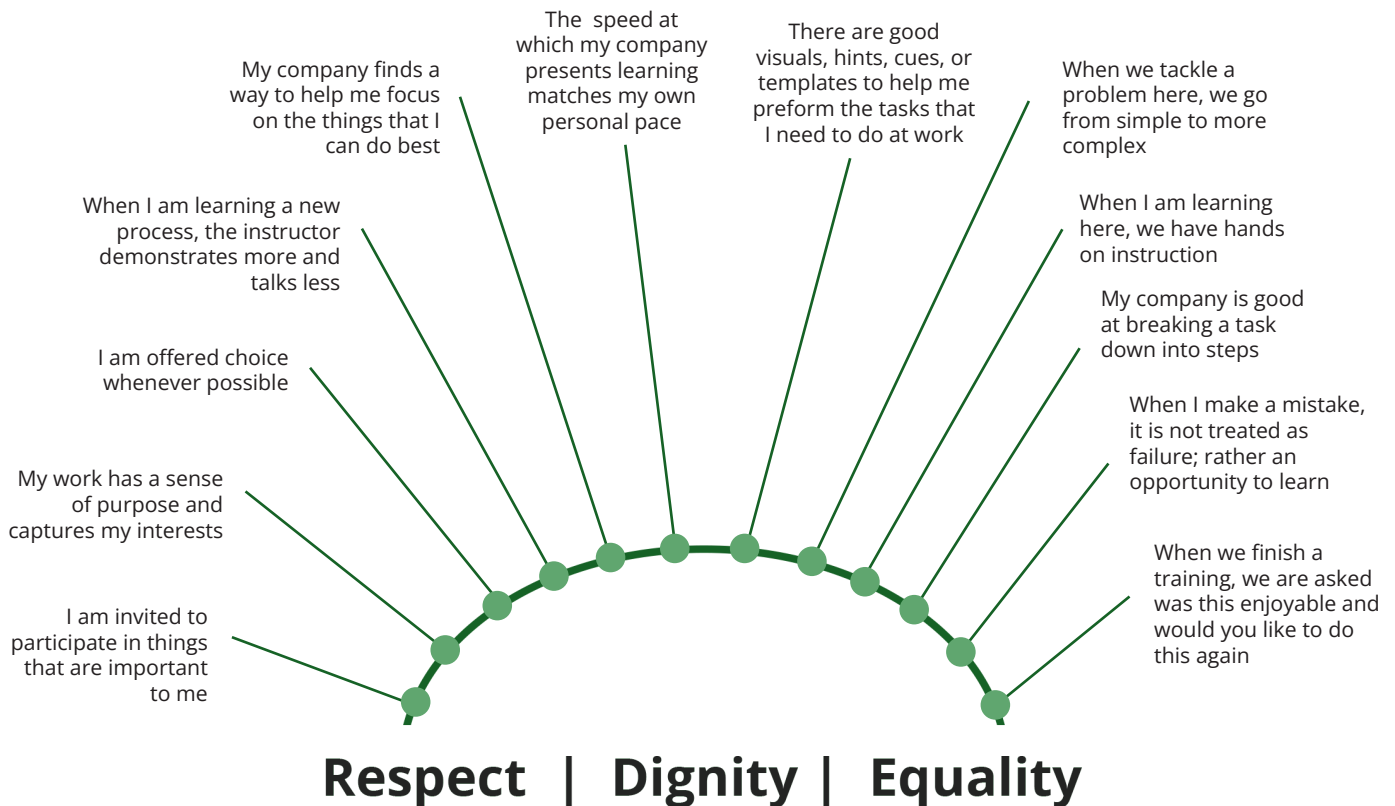
The Montessori Inspired Lifestyle® is an approach that creates a prepared environment based on respect, dignity, trust and equality, and is the central philosophy behind everything we do. It is the perfect platform for your organization to build a highly acclaimed employee engagement experience that fits your organization's identity.

At Monarch Pathways, our goal is to transform organizations in a way that fosters respect, dignity, and equality for employees. To accomplish this, we have adapted strategies from the Montessori educational system and applied them to work environments. We believe:

- **Respect, dignity, trust, and equality** are necessary for employees to feel that they are welcome and they belong in their workplace.
- **Employee behaviors represent unmet needs.** We must consider the root cause of "difficult" staff behaviors and how contextual factors play a role in these behaviors.
- **Everyone wants to have a purpose.** By learning about each employee's unique identity and passions, we can identify roles and responsibilities that leverage those passions, build job satisfaction, and instill a sense of purpose and belonging at work.
- **Focus on the positives.** Rather than spending time discussing challenges and difficulties, we use an Appreciative Inquiry framework to encourage staff to reflect on past successes, dream about an organization that is fully engaged, and decide together how to bring that dream closer to reality.
- **Emotional safety is as important as physical safety.** It is critical for staff to feel that they can trust their team and their leadership, safely ask for help when they need it, and resolve conflicts effectively when they arise.

# OVERVIEW OF THE MONTESSORI INSPIRED LIFESTYLE® FOR STAFF ENGAGEMENT

Maria Montessori challenged assumptions about what was possible for the children she worked with. By creating an engaging environment that fostered interaction and meaningful activity, the undisciplined and illiterate children of Montessori's first Casa dei Bambini began to thrive and learn in ways that educators at the time thought was not possible. Today, we continue Montessori's legacy by challenging assumptions about what is possible for employees. The following 12 Montessori Principles form the basis of a happy and healthy workplace culture:



# BECOMING CREDENTIALIALED

## WE DO THINGS DIFFERENTLY.

Becoming a Montessori Inspired Lifestyle® Organization includes more than a “one and done” education. Training on the Montessori Inspired Lifestyle® includes both education and guidance for your employees as they adopt and implement the Montessori principles. At each credentialing level, employees will progress from **basic** milestones to **advanced** milestones, in which Montessori principles are fully integrated into employee practices. Together with Monarch Pathway’s staff of educators and coaches, your community will **learn, implement, achieve, and sustain** – prepare to be amazed!



### Learn

Start with an initial training where all employees are invited to think differently about their engagement at work and take on meaningful roles.

Following initial training, “Champion Groups” work with us to identify obstacles and build on successes, creating a work culture of respect, trust, dignity, and equality.

### Implement

### Achieve

Achieve better outcomes in your community. As staff begin to meet milestones, your community will earn Bronze, Silver, and Gold credentials, and your community will be listed on our web directory of Montessori Inspired Lifestyle® communities.

Sustainability is the key to long-term success. Internal champions within your organization will receive training and resources to maintain the quality standards of the Montessori Inspired Lifestyle® for employees.

### Sustain

# CREDENTIALING TIMELINE AND

# KEY MILESTONES

Over 18 months, staff work with Monarch Pathways to achieve Bronze, Silver, and Gold milestones:

## BRONZE

### Communication

- Huddles
- Weekly Meetings
- Monthly Meetings

Months 1-6

## SILVER

### Responsive Behaviors

- Ask/Why/Try 1:1
- Ask/Why/Try Small Group
- Ask/Why/Try Large Group

Months 7-12

## GOLD

### Growth and Development

- Transformational Model Designed
- Professional and Personal Coaching

Months 13-18

## Montessori Inspired Lifestyle® Credentialing Milestones

<b>Bronze</b>	<b>Silver</b>	<b>Gold</b>
<b><i>Montessori Inspired Team Communication For Employees</i></b>	<b><i>Montessori Inspired Approach to Responsive Behaviors For Employees</i></b>	<b><i>Montessori Inspired Personal and Professional Growth For Employees</i></b>
<p>To achieve Bronze status, 6 months or more after the initial training:</p> <ul style="list-style-type: none"> <li>• At least 75% of the trained teams/departments in the organization are practicing huddles, weekly meetings, monthly meetings and:</li> <li>• Meet the Bronze basic level criteria and are moving toward advanced</li> </ul>	<p>To achieve Silver status, 9 months or more after the initial training:</p> <ul style="list-style-type: none"> <li>• Meet the advanced criteria for Bronze status and:</li> <li>• At least 75% of the trained teams/departments in the organization are practicing Ask/Why/Try technique (1:1; Small Groups and Team) and:</li> <li>• Meet the Silver basic level criteria and are moving toward advanced</li> </ul>	<p>To achieve Gold status, 12 months or more after the initial training:</p> <ul style="list-style-type: none"> <li>• Meet the advanced criteria for Bronze status and:</li> <li>• Meet the advanced criteria for Silver status and:</li> <li>• At least 75% of the trained teams/departments have implemented a coaching model and:</li> <li>• Meet the Gold basic level and are moving toward advanced.</li> </ul>
<b>At Least 2 Communication Champions Per 50 Staff</b>	<b>At Least 2 Responsive Behavior Champions Per 50 Staff</b>	<b>At Least 2 Growth and Development Champions Per 50 Staff</b>
<b>Huddles</b>	<b>Ask/Why/Try (1:1)</b>	<b>Transformational Plan Developed</b>
<b>Weekly Meetings</b>	<b>Ask/Why/Try (small group)</b>	<b>Coaching Model in Place for 6 months</b>
<b>Monthly Meetings</b>	<b>Ask/Why/Try (Team)</b>	<b>Gold Site Visit</b>

# MILESTONE GUIDANCE AND DEFINITIONS

## Bronze: Montessori Inspired Team Communication

### Requirements to Apply for Bronze

- ◆ 6 months or more after the initial training:
  - At least 75% of the trained teams/departments in the organization are practicing huddles, weekly meetings, and monthly meetings, meeting the basic level criteria, and moving toward advanced (see below), and:
  - Monthly zoom visits with champions, and:
  - Application for Bronze status and Zoom visit for verification

### Definitions

- ◆ Huddles
  - Huddles are short (5-7 minute) stand-up meetings designed for staff to agree on what needs to be done TODAY! Huddles help align a team's understanding of the day's priorities and create purpose, urgency, and accountability. If anyone loses focus, they will immediately be redirected to the priorities of TODAY by the huddle leader.
- ◆ Weekly Meetings
  - No longer than 30 minutes, weekly meetings offer opportunities for a team to reflect on important matters from the prior week. How did we do last week? How can we improve this week? What two key things is the team working on achieving, and what role is everyone playing to make it happen? Did you do what you said you would do? Did it make a difference? These meetings are fast-paced and to the point.
- ◆ Monthly Meetings
  - No longer than 60 minutes, monthly meetings are an opportunity to reflect on the last month and look ahead to the next month. This meeting is a time for celebration and recognition, and an opportunity to make larger adjustments to meet departmental goals.



## Basic Level Criteria - On the Way!

- ◆ Huddles, Weekly Meetings and Monthly Meetings are in place and verified
- ◆ New Employees are trained in Montessori Inspired Huddles
- ◆ Champions are selected and part of a Lead Group

## Advanced Criteria - Expertise!

- ◆ 75% include themes, inspirational thoughts and warmups
- ◆ 50% are led by non-supervisory staff

## Silver: Montessori Inspired Approach to Responsive Behaviors from Staff

### Requirements to Apply for Silver

- ◆ 9 months or more, after the initial training:
  - 75% of the managers/supervisors across the organization are utilizing Ask/Why/Try with individuals, small groups and teams when needing to have a conversation about a responsive behavior at least at the basic level and moving toward advanced, and:
  - Maintaining Bronze requirements, and:
  - Monthly zoom visits with champions, and:
  - Application for Silver status and Zoom visit for verification

### Definitions

- ◆ Ask/Why/Try
  - When an employee has a responsive behavior (such as coming to work late, having challenges working with others, etc.), supervisory staff utilize the Ask/Why/Try technique. This is a three-part process in which the supervisor ASKS to discuss the concern, seeks to understand WHY the behavior occurred, and works with the employee to TRY a solution together.
  - This technique is effective in 1:1 situation as well as for small groups and teams.

## Basic Level Criteria - On the Way!

- ◆ Ask/Why/Try techniques are utilized, demonstrated and verified through the use of the Ask/Why/Try forms from HR.
- ◆ New employees are trained in the Ask/Why/Try technique upon hire.
- ◆ Champions each create a case study from a real organizational example.

## Advanced Criteria - Expertise!

- ◆ Staff demonstrate the use of Ask/Why/Try in:
  - supervisory relationships
  - peer-to-peer interactions
  - group-based settings

## Gold: Personal and Professional Growth for Employees

### Requirements to Apply for Gold

- ◆ 12 months or more, after the initial training:
  - Personal and Professional Growth Plan for Employees is implemented, and coaching model is in place for 6 months for 50% of all staff moving toward 75%, and:
  - Maintaining Bronze and Silver requirements, and:
  - Monthly Zoom visits with champions, and:
  - In person site visit for verification of Gold status.

### Definitions and Objectives

- ◆ Coaching Plan
  - The organization has developed a written plan to implement a coaching model for all employees based on their words and wisdom.
  - This plan includes conducting an organizational conversation with at least 80% of the employees (full and part time) and asking them the following question: If you were to have time with someone in your organization, and the purpose of that meeting was to help you be at your best at work as often as possible; what would that meeting look like to you?
- ◆ Decide how best to match employees with coaches.
- ◆ Determine any type of paperwork.
- ◆ Decide if you will continue to do annual evaluations or discontinue them.

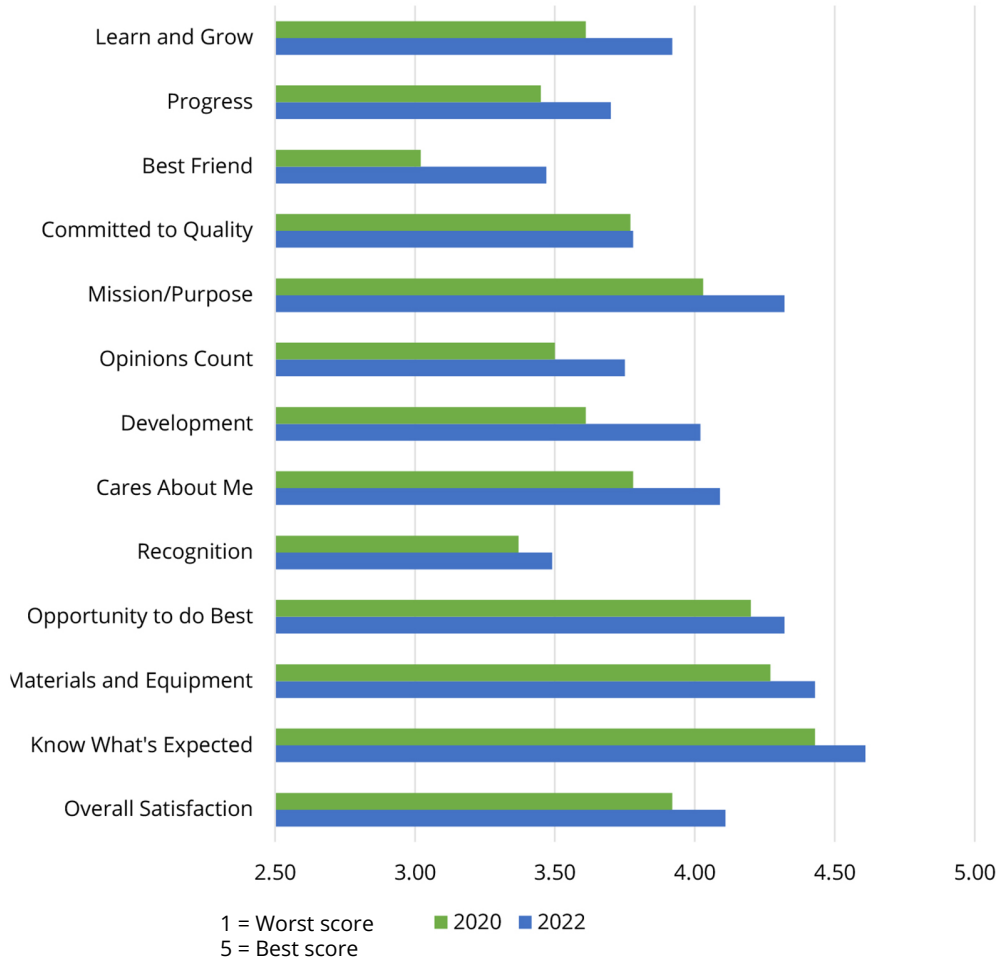
### Basic Level Criteria - On the Way!

- ◆ Developed a training for the supervisors/managers or others who will be coaches.
- ◆ New employees are welcomed into the coaching process during new hire orientation.
- ◆ Champions selected, part of Lead Group and each create a case study from a real coaching experience.

### Advanced Criteria - Expertise!

- ◆ Lead Group prepares for site visit ensuring that Bronze, Silver and Gold requirements are verified and there is a plan in place to maintain and sustain.

**Actual Gallup Q12 Outcomes from One Client during COVID**



**CONTACT US**  
 TODAY

*TO BEGIN YOUR CREDENTIALING JOURNEY!*